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ABSTRACT

This guide is intended to assist faculty senates in West Virginia as they develop strategic plans required by state legislation for the integration of students with exceptional needs into regular classrooms. Following a summary of the legislation, required plan components are described, and a copy of the required form is presented. Sections of the guide present definitions, concepts, and resources to be used in the development and implementation of specific components of the strategic plan. Plan components include: (1) mission statement; (2) goals; (3) needs; (4) objectives and activities; (5) evaluation; (6) staffing; (7) collaboration; and (8) training. A list of additional resources concludes the guide. (Contains 48 references.) (DB)

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A STRATEGIC PLANNING GUIDE FOR WEST VIRGINIA'S FACULTY SENATES

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West Virginia Department of Education
Henry Marockie, State Superintendent of Schools
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WEST VIRGINIA DEPARTMENT OF EDUCATION

Dr. Henry R. Marockie, State Superintendent of Schools
Building 6/1900 Kanawha Blvd. E./Charleston, West Virginia 25305-0330

Phone: 304-558-2681
Fax: 304-558-0048

West Virginia Board of Education
Audrey S. Horne, President
Paul J. Morris, Vice President
Cleo P. Mathews, Secretary
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Michael D. Greer
Sheila M. Hamilton
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MEMORANDUM

TO: Faculty Senate Presidents
Other Persons Addressed

FROM: Michael A. Valentine, Ph.D.
Director

RE: Strategic Planning Guide for Faculty Senates

DATE: December 20, 1994

Enclosed is a copy of A Strategic Planning Guide for West Virginia Faculty Senates. This manual is a resource document provided by the West Virginia Department of Education to assist faculty senates in the development of a strategic plan as required by state legislation for the appropriate integration of exceptional needs students. The provision of the legislation pertaining to the faculty senate strategic plan are now included in the School Laws of West Virginia in Code §18-5A-5, which establishes faculty senates and describes their governance. The legislation as it appears in West Virginia Code is located in the RESOURCES section of this document and is summarized in the INTRODUCTION section.

The faculty senate may choose to use this Guide, parts of it or other resources. Regardless of the approach used, the faculty senate must complete and submit to the county superintendent of schools by **March 1, 1995**, a strategic plan that includes all the components required by law. A Strategic Plan form for this purpose is provided on pages I-12 and I-14 of the Guide.

A Mini-Guide, which can be used in lieu of A Strategic Planning Guide for West Virginia Faculty Senate, is provided on pages MG-1 through MG-7. The Mini-guide provides a brief explanation of the required components and includes a copy of the two page Strategic Plan form to be used for submission of the plan to the county superintendent.

This Strategic Planning Guide can provide the faculty senate direction, suggestions and resources for developing strategic planning as you endeavor to implement this legislation and, more importantly, strive to plan and implement educational experiences to meet the needs of all the students served by your school.

To inquire about available training and technical assistance in developing the strategic plan, contact your Regional Education Service Agency (RESA) or the West Virginia Department of Education, Office of Special Education Programs and Assurances. If there are questions or additional information is needed, please contact the Office of Special Education Programs and Assurances at 558-2696 (V/TDD).

MAV/mp

Enclosure

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FOREWORD

The West Virginia Department of Education is pleased to provide this resource guide to assist faculty senates in the development of strategic plans, as required by recent state legislation, for the appropriate integration of exceptional needs students into regular classrooms. This legislation provides an opportunity for all teachers, as members of a faculty senate, and others involved in the educational process, through their participation in the strategic planning process, to provide input that will determine the direction and pace of the appropriate placement of students with exceptional needs in their schools.

The state and federal laws related to serving students with exceptionalities (disabled and gifted) have not changed regarding placement in the least restrictive environment. Decisions regarding the appropriate placement of a student in the regular classroom continue to be made individually through the development of the individualized education program (IEP). An array of placement options must still be available to meet the needs of students with exceptionalities. Appropriate placement does not mean that all exceptional needs students will be in regular education classes.

During the 1994 legislative session, Senate Bill 1000 provided a new responsibility for faculty senates. This responsibility addresses planning and managing the appropriate placement of students with exceptional needs into the regular classroom. The provisions set forth in Senate Bill 1000 are now a part of West Virginia Code 18-5A-5 which establishes faculty senates and defines their governance. The legislation requires that, to manage the appropriate placement of exceptional needs students, each faculty senate shall develop a strategic plan and submit the plan to the county superintendent of schools by the first day of March 1995 and periodically thereafter pursuant to guidelines developed by the Department of Education. The legislation, also, describes the specific components to be addressed in each faculty senate's strategic plan and requires the faculty senate to encourage the involvement of others, such as the school improvement council, parents and community members, in the planning process.

This strategic planning handbook has been prepared by the Department of Education to assist faculty senates in the development of each required component of the strategic plan. Strategic planning by faculty senates will make West Virginia a leader in the nation in designing schools and classrooms to meet the needs of all students, including students with exceptional needs.

Henry Marockie
State Superintendent of Schools

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ACKNOWLEDGEMENTS

The Faculty Senate Strategic Planning Guide was developed by the **West Virginia Department of Education** with assistance from the Regional Education Service Agencies (RESAs).

In addition, sections of the draft copy of A Strategic Planning Guide for West Virginia's Faculty Senates were "field-tested" and reviewed by the following groups. Their comments and suggestions helped immensely in the revision and refinement of the Guide's content and activities.

- School-Based Inclusion Teams from the following schools:

Bridgeview Elementary	Kanawha County
East Hardy Early/Middle	Hardy County
Parkersburg South High	Wood County
Ranger Elementary	Lincoln County
Short Line Elementary/Middle	Wetzel County
Switchback Elementary	McDowell County
T.A. Lowery Elementary	Jefferson County
Triadelphia Middle	Ohio County

- Seventy-two (72) participants in a class on Educational Issues sponsored by RESA I, including regular and special education teachers, principals and support personnel from McDowell, Mercer, Monroe, Raleigh, Summers and Wyoming County Schools in RESA I, Mingo County Schools in RESA II and Fayette, Greenbrier and Nicholas County Schools in RESA IV.

- A panel of five (5) regular education teachers and principals, who are Milken Award recipients, reviewed the Guide and provided valuable input regarding the content and format of the document.

- The assistance of the Integrated Education Initiative (IEI) Advisory Committee in providing advice regarding the appropriate integration of students with exceptionalities is also appreciated. The IEI Advisory Committee is comprised of regular and special education teachers, parents of disabled and nondisabled students, regular and special education administrators, including principals, institutions of higher education personnel from both regular and special education teacher training programs, representatives of the West Virginia Education Association and the West Virginia Federation of Teachers, representatives of parent, professional and advocacy organizations, and Department staff representing four (4) offices in three (3) different divisions.

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Appropriate Integration of Exceptional Needs Students

Legal Origins

Over the last 20 years a number of concepts such as least restrictive environment, mainstreaming, integrated education, regular education initiative, and now **inclusion** have been associated with the education of students with exceptionalities (disabled and gifted). All these concepts involve some form of participation of a student with an exceptionality in regular education. During these years the **law has not changed** regarding the consideration of educational placement for students with exceptionalities. The decision of placement, including the amount of participation in regular education as appropriate, remains the decision of the student's individualized education program (IEP) committee.

Although there is no universally accepted definition of inclusion, it generally involves a commitment to educate, where appropriate, a student with an exceptionality in the school and/or class the student would attend if the student was not identified as exceptional. **Inclusion does NOT mean that all exceptional needs students must be educated totally in the regular classroom**. Although the IEP committee must first consider the regular classroom, the law does not require that the student be placed in the regular classroom and fail before other placement options are considered. The appropriate placement must be determined **individually** and a full array or continuum of alternative placements must be available if needed.

The basis for considering the inclusion or integation of students with disabilities began with the passage of the EHA - Education for Handicapped Children Act (PL 94-142) in 1975, as amended by the IDEA - Individuals with Disabilities Education Act (PL 101-476) in 1990. The law requires local school districts to develop "procedures to assure that, to the maximum extent appropriate, children with disabilities, including children in public or private institutions or other care facilities, are educated with children who are not disabled, and that special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only when the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily", better known as **least restrictive environment** [29 U.S.C. 1412(5)(B), see also 34 C.F.R. 300.500].

The IDEA also requires that decisions regarding the placement of students with disabilities must be made **individually** through the development of the **Individualized Education Program**. Removal from the regular education classroom must be justified, through consideration of evaluation and other data, and documented. Each public agency must ensure that a continuum of alternative placements is available to meet the needs of children with disabilities for special

West Virginia Code: 18-5A-5

The strategic plan to be developed by each faculty senate by March 1, 1995, shall include at least:

A. mission statement;

B. goals;

C. needs;

D. objectives and activities to implement plans relating to each goal;

E. work in progress to implement the strategic plan;

F. guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional students without diminishing the services rendered to the other students in integrated classrooms;

G. guidelines for implementation of collaborative planning and instructions; and

H. training for all regular classroom teachers who serve students with exceptional needs in integrated classrooms.

INTRODUCTION

OVERVIEW OF THE STRATEGIC PLANNING GUIDE

A Strategic Planning Guide for West Virginia Faculty Senates is divided into ten sections as outlined in the Table of Contents. Each section of the document focuses on definitions, concepts and specific information, including resources, to be used in the development and implementation of the strategic plan. The first section is this introductory section, which includes:

a) the provisions of the legislation,
b) a discussion of strategic planning,
c) a description of the "Plan to Plan" process, and
d) facilitator's instructions, an explanation of how to use the Guide.

This information is provided to assist you in the facilitation of the strategic planning process.

THE LEGISLATION

The legislation requires that each faculty senate develop a strategic plan for the appropriate placement of exceptional students into the regular classroom. The provisions of the legislation pertaining to the faculty senate strategic plan are now included in the School Laws of West Virginia in Code 18-5A-5, which establishes faculty senates and describes their governance. The legislation as it appears in West Virginia Code is located in the RESOURCES section, beginning on page R-1.

Specifically, the major new provisions of 18-5A-5 require:

> Each faculty senate to develop a strategic plan for managing the appropriate integration of exceptional, or special, needs students into the regular classrooms at its school. The strategic plan must be developed and submitted to the county superintendent by March 1, 1995, and periodically thereafter pursuant to guidelines developed by the state department of education.
>
> Each faculty senate to encourage the participation of local school improvement councils, parents and the community at large in the development of the strategic plan.
>
> Each faculty senate to develop a strategic plan to include at least: a) a mission statement, b) goals, c) needs, d) objectives and activities to implement plans relating to each goal, e) work in progress to implement the strategic plan, f) guidelines for the placement of

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additional staff into integrated classrooms to meet the needs of exceptional needs students without diminishing the services rendered to the other students in integrated classrooms, g) guidelines for the implementation of collaborative planning and instruction, and h) training for all regular classroom teachers who serve students with exceptional needs in integrated classrooms.

Additionally, new related provisions of school law require:

Each county school district to file integrated classroom strategic plans and training related to integrated education, and basic and specialized health care procedures, including the administration of medications, with the state superintendent of schools on forms supplied by his office, applications, annual reports, and such other reports as he may require (18-20-3).

The state superintendent of schools to receive county plans for integrated classrooms submitted by county boards of education and to submit a state plan, approved by the state board of education, to the legislative oversight commission on education accountability no later than November 30, 1994.

The West Virginia Department of Education guidelines for the submission of county integration plans will be forthcoming and will be disseminated to each school district's central office and each school upon completion.

WHAT IS STRATEGIC PLANNING

Strategic planning by definition is "a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it" (Bryson, 1991). It requires the school to gather information, explore alternatives and identify future implications of present decisions. Strategic planning is a tool for schools to use when defining and creating a better future for education.

Strategic planning is a dynamic, active process of scanning current realities and opportunities in order to identify useful strategies for approaching a better tomorrow. It requires the school to involve its educational partners in defining and supporting the purpose and mission of the school and provides a blueprint for results-oriented progress in achieving our vision (Kaufman and Herman, 1991).

Strategic planning is a forward-looking, proactive form of planning. Due to its proactive nature, this type of planning can help schools to move systematically toward defining and creating a better world (Kaufman and Herman, 1991). Strategic planning is one way to help schools deal with their

changed circumstances. . . in this case, the inclusion of students with exceptional needs. Bryson (1991) suggests that strategic planning can help a school to:

- think strategically and develop effective strategies;
- clarify future directions;
- establish priorities;
- build teamwork and expertise;
- solve major organizational problems;
- make decisions across levels and functions; and,
- improve organizational performance.

Strategic planning can help schools build upon their strengths and take advantage of major opportunities, while they overcome or minimize weaknesses and barriers. The desired outcomes of the strategic planning process are clarity, consensus and commitment about the school's strategic direction. While time-consuming, according to Olsen (1991), "The process is equal in importance to the product."

To successfully approach and support the integration of students with exceptionalities, a school must have an internal investment in the process, which in turn reflects and defines the school's vision. The planning process and desired best practices may be similar from one school to another, but the markers of success along the way need to reflect the distinct characteristics and context of each school (Halvorsen in Karasoff & Alwell, 1992). For this to occur, key players must direct the process. Only these persons have the required expertise and knowledge of the school to facilitate the change process.

PLANNING TO PLAN

The first step in a strategic planning process is the development of a **Plan to Plan**, which is a general plan for communication with all parties involved. The Plan to Plan is the general "blueprint" for all activities to be accomplished when developing the school's strategic plan. The Plan to Plan includes the identification and notification of stakeholders, the scheduling of planning activities and identification of available and needed resources, including a budget if necessary. The Plan to Plan is developed by a **School-Based Planning Team**. This school-based planning team should be comprised of the faculty senate president or designee, the principal, parent(s), and representative regular and special education teachers. Larger schools may want to increase the membership of the school-based planning team to include other individuals.

A planning team of five (5) to eight (8) people is an effective size for this is the group that also accomplishes much of the work in the development of the strategic plan. The functions of the school-based planning team include, but are not limited to: developing the Plan to Plan;

identifying other potential members for the **Stakeholder Committee** (see below); developing meeting agendas; and, notifying all parties of meetings and assignments. In other words, the planning team facilitates and "steers" the strategic planning process. A critical responsibility of the planning team is to summarize and refine the input provided by the stakeholder committee and to prepare that input for discussion and action at the next stakeholder meeting.

The planning team must, also, obtain authority and support from the appropriate persons before proceeding, and allow sufficent time for conducting team meetings and for soliciting stakeholder involvement. The strategic planning process will take, at least, six months and, in many cases, longer. Adequate time must be scheduled to successfully address each section described within this document. Additionally, the planning team must allow for the following critical factors in planning for the effective, appropriate integration of students with exceptional needs into the regular education classroom:

- developing a consensus based vision,
- fostering shared leadership,
- initiating a change-oriented environment, and
- energizing staff.

One of the first activities to be included in the "plan to plan" should be the identification of those persons affected by the results of the strategic plan; in other words, individuals who have a "stake" in the development and implementation of the strategic plan. This **Stakeholder Committee** should include the principal, faculty senate, local improvement council, parents and business and community representatives. Schools can use the existing school improvement council for developing the strategic plan for the appropriate integration of exceptional needs students by expanding its membership to include parents of disabled/exceptional students, and representatives from business partnerships, professional and civic organizations and community agencies. The function of the Stakeholder Committee is to provide input at each stage of the planning process and to assist in the evaluation of the school's progress in the implementation of the strategic plan.

Schools may choose to utilize the input and expertise of a broader representative group than the stakeholders such as a **Review Group**. The role of the Review Group would be to review the strategic plan in its final form, provide comments, evaluation/implementation feedback and/or other comments. Persons comprising the Review Group should be provided with general information and status reports of the progress made in accomplishing the objectives set forth in the strategic plan. The Review Group may be made up of local business/community groups, agencies and local board of education members.

The importance of developing the strategic plan through an interactive group process, involving the stakeholders at each step of the process, is emphasized in the legislation, which states: "Each faculty senate shall encourage the participation of local school improvement councils, parents and the community at large in the development of the strategic plan at each school".

Participation of key players affected by the strategic plan allows for expressions of concern and provides the vehicle to address multiple issues throughout the strategic planning process.

An article, entitled "The Leader's Role", describing the common practices of leaders is located in the RESOURCES section beginning on page R-1. The information in this article will be helpful to the planning team and others as they facilitate the strategic planning process.

Once the planning team has selected the groups/individuals to utilize throughout the strategic planning process, the activities to be accomplished in securing their input should be recorded in the Plan to Plan. The planning team should then discuss and record all the activities the team determines is necessary to complete the strategic planning process. These activities should include identifying the personnel to be utilized in facilitating the stakeholders through the strategic planning process. This role of facilitator may be assigned to one specific person or a team of people. If a team is chosen as facilitators, the planning team should carefully discuss the roles and responsibilities of each team member and document the results within the Plan to Plan.

FACILITATOR'S INSTRUCTIONS

The Appropriate Integration of Exceptional Needs Students in the Regular Classroom: A Strategic Planning Guide for West Virginia Faculty Senates is provided by the West Virginia Department of Education to assist faculty senates in the development of the required strategic plan. The faculty senate may choose to use: this Guide, parts of it, other resources instead of, or with this Guide, or to use no resources at all. Regardless of the approach used, the faculty senate must complete and submit by March 1, 1995 to the county superintendent of schools a strategic plan with all the required components. A Strategic Plan form for this purpose is provided on page I-13.

A Mini-Guide is provided on pages MG-1 through MG-7 for those who choose not to use the Strategic Planning Guide for West Virginia Faculty Senates. The Mini-Guide privides a brief explanation of the required components and provides a faculty senate strategic plan form. Using the Mini-Guide, a faculty senate can develop a plan that minimally meets the legislative requirements.

This "Facilitator's Instructions" sub-section provides information on the organization, or format, of the guide and how to use it. The sections of the guide (Sections A through G) are sequenced in the same order as the components are listed in the legislation. However, the sequence of the components in the legislation does **NOT** correspond to the logical sequence of steps in a typical strategic planning process. For example, a needs assessment (Section C) is completed prior to the development of the goals (Section B). Also, since the needs assessment should address the issues of staffing, collaboration and staff development, it may be helpful to read Sections F through G prior to conducting the environmental scan and completing the needs assessment.

Although staffing, collaboration and staff development are listed as separate components of the strategic plan in the legislation, they are issues that must be discussed and addressed by the faculty senate in the development of the plan. The content in Sections F through H provides information that can be used by the faculty senate throughout the strategic planning process. However, in the actual strategic plan what will be undertaken by the faculty senate is reflected in the objectives and activities. Consequently, each faculty senate's strategic plan should have, **at least**, one specific objective with supporting activities for each of these three areas.

IT IS VERY IMPORTANT that the planning team and/or facilitator(s) of the strategic planning process **READ THE ENTIRE GUIDE** prior to convening a meeting of the stakeholders. By reading the entire guide, the planning team/facilitator(s) will have an understanding of the entire strategic planning process and will be better able to develop an appropriate Plan to Plan and meeting agendas, and make informed decisions about what materials or information to provide the stakeholders at each meeting. Reading the entire Guide also will provide a sense of the relationship of the separate components and how the information from one section can be used to develop or evaluate other components. For example, the sections on staffing, collaboration and training, or staff development, all include questions/issues that must be addressed as a part of the needs assessment described in Section C. The Tools for Section C include practices and strategies that can be used to develop the objectives and activities of the strategic plan. Scheduling for collaboration (Section G) and scheduling for instruction both greatly influence staffing patterns (Section F).

This required strategic planning process should not be undertaken as a separate process, but should be an integral part of the existing school improvement process whenever possible. To be effective and successful, efforts to plan and implement appropriate integration strategies must be "integrated" into the school's efforts to provide quality educational opportunities to all its students, regardless of their needs and abilities. If the school has a current improvement plan, then, by adding, if necessary, a goal related to the appropriate integration of exceptional needs students, objectives to address the three issues of staffing, collaboration and staff development, and activities to achieve the objectives the faculty senate can meet the strategic plan requirement. Other efforts, such as the review and revision, if necessary, of the school's mission statement and the collection and analysis of current needs assessment information, will have to be completed prior to the completion of the plan. Of course, the content required to meet the strategic plan requirement will have to be transferred to the appropriate plan form for submission to the county superintendent of schools.

Each of the Sections A through H is divided into parts: general information and tools. The general information part includes the definition and concepts, as well as specific steps on the development and implementation of that component. The Tools part includes activities, materials that can be used for handouts or transparencies by the facilitator(s) and/or additional resource information. The resources provided in the Tools sections are samples; therefore, the facilitator(s)

may choose to use these resources or decide to use other materials that serve the same purpose. Although the Tools information in each section was included purposefully to use with or provide to the faculty senate members and other stakeholders, the planning team/facilitator(s) may also want to copy all or parts of the general information for the stakeholders.

Each section provides you, the planning team/facilitator(s), with the step-by-step guidance and resources necessary to:

Present or train the concepts and information covered in each section; and

Facilitate the group processes introduced in each section.

The accompanying video-tape provides a general overview of the format and content of the Guide. The video-tape can be shown to the faculty senate and the other stakeholders as a means of introducing them to strategic planning, the requirements of the legislation and the content of the Guide. It is brief (less than 30 minutes in length) and can be used at the beginning of the strategic planning process to provide everyone involved an idea of what the process entails and the expected results.

Section A: Mission Statement

To facilitate the development or revision of a mission statement, the faculty senate may want to use someone who is not a member of that faculty senate to guide the process. Having an **"outside" facilitator** enables all faculty senate members to participate as equal team members in the development process. It is difficult to both facilitate this step and to participate at the same time. This facilitator could be a staff member from another school, central office or a professional organization. A facilitator should have knowledge of the strategic planning process, particularly the formulation of mission statements, and experience with small and large group processes. However, some experience with small group processes and consensus building is more important.

To facilitate the Beliefs Activity, create a worksheet for each group member. At the top of the sheet print BELIEFS: Activity Worksheet. Then print the instructions, which are "Write down ideas, words or statements which you think are important related to education, teaching and learning". The rest of the sheet can be blank or lined.

To facilitate the Vision Activity, create a worksheet for each group member. At the top of the sheet, print VISION: Activity Worksheet. Underneath the title toward the left margin, print "Scenario". About two-thirds down the sheet, toward the left margin, print, "Key Elements". The rest of the sheet should be blank. The instructions focusing the worksheet are on page A-9.

To use MISSION STATEMENT: Activity One, make a copy of the activity without the answers and have stakeholders, individually or in small groups, identify the necessary components of a

mission statement. Then, share the answers. An alternative approach is to make a transparency of page A-11 and cover the answers. In the large group, have participants volunteer the answers. Reveal the "correct" answers after participants have responded.

To facilitate Activity Two, create a worksheet for each group member. Print at the top of the sheet, "MISSION STATEMENT: Activity Two". Underneath the title, print the following instructions: "Write ideas, thoughts or statements which you think are appropriate for the school's mission statement based upon the group's beliefs and vision." The rest of the worksheet can be blank or lined.

Section B: Goals

The needs assessment must be conducted prior to developing goals.

When the needs assessment data has been collected, compiled and analyzed, then based upon the needs assessment results the faculty senate can identify the priority needs, which become the basis of the goals developed/selected for the strategic plan.

Section C: Needs Assessment

The needs assessment can be conducted by compiling informal assessment information and/or by utilizing formal needs assessment instruments. There are many needs assessment instruments available and a variety of approaches that can be used. The Effective Practice Checklist for the Building Level is provided as a sample of a formal needs assessment instrument. This tool was developed by the California Research Institute on the basis of information provided by federally funded integration projects in 16 states.

All the indicators on this Checklist may not be appropriate nor relevant for every school; consequently, please read carefully the instructions on page C-6 of 32 preceding the Checklist and the information provided below.

One way to use The Effective Practice Checklist for the Building Level, is to have each faculty senate member individually complete the checklist. The planning team then tallies the results to determine which items were rated as priorities by staff members. Some groups may also want to use this instrument with a broader stakeholder group (e.g. Review Group). Another option is to select a smaller number of items and develop a modified checklist to solicit stakeholder input.

The Checklist can be used to regularly check the school's progress in implementing the strategic plan by redistributing the completed checklists to staff and having them periodically rate the status of implementation in the second or third "Date" column.

The following are definitions for several terms used in the Checklist:

Natural proportions - means that the number of students with disabilities in a school or regular classroom occurs in about the same ratio as disabled and nondisabled in the community-at-large.

Home school - means the school that a student with disabilities would attend if the student was not disabled.

Natural setting - means an environment in which the student is taught skills and behaviors, because it is the setting in which the student will be expected to use/apply the skills or behaviors that are being learned.

Natural supports - means assistance and interaction between friends, "buddies" or other classmates and the disabled student in the classroom, the school and other environments.

Section D: Objectives and Activities

Since all educators have experience developing objectives and activities, whether in lesson plans, behavioral management plans, administrative management plans or school improvement plans,this step should be relatively easy. What will take time and require preparation is the discussion of the issues of staffing, collaboration and staff development needs. The meetings at which these issues are to be discussed must be carefully planned to provide all participants the opportunity to be heard and to guide the discussion toward achieving consensus on priority needs and solutions.

Sections F, G and H all include information to facilitate the consideration of staffing, collaboration and staff development issues. In addition, the Effective Building Level Practices and Supportive Strategies (pages C-13 through C-32) provide many practices that can be used as objectives in the strategic plan and strategies that can be used as activities.

Section E: Evaluation

This section includes a form for outlining the specifics of an evaluation plan. Input regarding what and how to evaluate should be obtained from the stakeholders; however, the actual completion of the form may be done by the planning team/facilitator(s) and shared with the stakeholders for additional input or information. In addition, the planning team/facilitator(s) may want to assign the responsibilities for implementation of the evaluation plan to specific individuals or groups of stakeholders.

Section F: Staffing

This section should be read and discussed **prior** to the development of the objectives and activities for the strategic plan. The questions and considerations described in this section provide a means of guiding the faculty senate or stakeholders' discussions to focus on the critical issues for their school. Which issues are most important or immediate will vary from school to school.

Discussions of staffing should occur simultaneously with the discussions of collaboration, especially the scheduling of time for collaborative planning and delivery of instruction and the selection of the collaborative models to be used to meet the needs of the students with available personnel and other resources.

The legislation specifies that the faculty senate's strategic plan will include "guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional students without diminishing the services rendered to the other students in integrated classrooms." These guidelines or objectives could include assuring that the supplementary services and aids, including special education personnel, are provided in the regular classroom to meet the needs of the exceptional students as specified on their IEPs. This is required by both federal and state Board of Education policy, and now by state legislation.

There are many different approaches to successfully meeting the needs of exceptional students in the regular classroom without diminishing the services rendered to the other students in the integrated classroom. Some of these approaches are described in the section on collaboration and must be considered as the faculty senate or stakeholders discuss staffing and staff development.

Section G: Collaboration

This section includes information on teaming, scheduling of collaborative planning time, communication mechanisms and a variety of collaborative models. Since collaboration and the time to collaborate regularly and appropriately are keys to the successful integration of exceptional needs students into the regular classroom, this is a very important section of the Guide. This section only provides a general idea of some of the approaches and resources that can be utilized.

Once the faculty senate has made some initial decisions regarding the collaborative approaches to use, the planning team, facilitator(s) or other designated person(s) should obtain additional information and plan staff development activities in the selected approaches.

Section H: Training

Although the legislation specifically requires that the faculty senate identify training to be provided for all regular classroom teachers who serve students with exceptional needs in integated classrooms, the strategic plan must address the staff development needs of all the staff. The implementation of appropriate integration strategies requires all personnel to adopt different roles and responsibilities, to learn alternative instructional strategies and skills and to apply these skills to improve instruction for all students. This requires planned, systematic and coordinated staff development.

Both regular and special educators must be involved in staff development activities together. For example, regular and special education teachers must learn collaborative skills and practice their application together to use these skills effectively. Also special educators must be involved in staff development related to general education curriculum and instruction. A special education teacher can not sucessfully collaboratively plan and deliver instruction or assist in the modification of instruction in math or science, if that teacher has not participated in the staff development provided for regular education teachers in these areas.

The staff development activities identified by the faculty senate as priorities may need to be sequenced and scheduled over more than one school year. The identified staff development needs of each school should be shared with the local staff development council so that shared needs can be identified and addressed from the county level when possible.

STRATEGIC PLAN FOR THE APPROPRIATE INTEGRATION OF EXCEPTIONAL STUDENTS INTO THE REGULAR CLASSROOM

School:_____ **Signature of Faculty Senate Chair:**_____

County:_____ **Name of Contact Person:**_____

Position:_____

***Mission Statement:**_____

_____

_____

****GOAL:**_____

***Objectives	Activities	Timeline	Person Responsible	Evaluation

* If mission statement requires more space, please print on a separate sheet and attach to this form

If more than one goal has been developed, use a **separate form for each goal.

***Objectives and activities must address, at least, staffing, collaboration and training, or staff development

STRATEGIC PLAN FOR THE APPROPRIATE INTEGRATION OF EXCEPTIONAL STUDENTS INTO THE REGULAR CLASSROOM

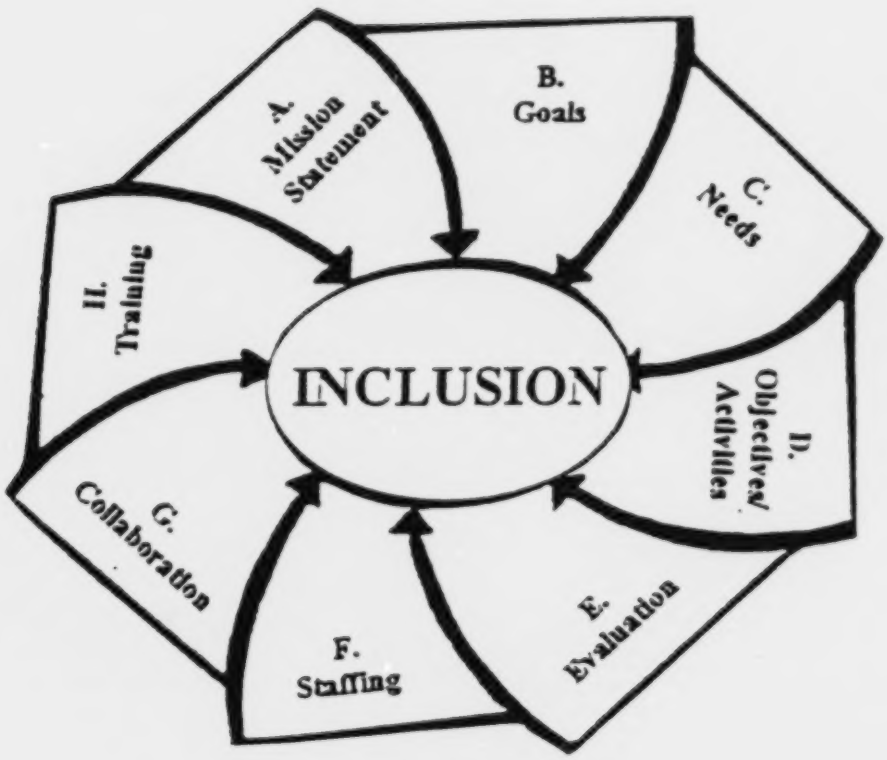
School:_____ **Signature of Faculty Senate Chair:**_____

County:_____ **Name of Contact Person:**_____

NEEDS ASSESSMENT: **Write** a brief summary of the needs assessment results **below or attach** a *summary report of the results.*

STAFFING and Collaboration: If the guidelines for the placement of additional staff into integrated classrooms and or the guidelines for the implementation of collaborative planning and instructon are not addressed or Not fully addressed in the objectives and activities of the strategic plan, please **attach** to this plan copies of the staffing and collaboration guidelines developed by the faculty senate.

MINI-GUIDE



and
Strategic Plan Form

FACULTY SENATE STRATEGIC PLANNING GUIDE

To assist Faculty Senates in completing the Strategic Plan for the appropriate placement of exceptional needs students into the regular classroom, the West Virginia Department of Education has developed a strategic planning guide. The guide contains two versions: 1) a brief, mini-guide and 2) a more detailed strategic planning process manual with examples and resources.

MINI-GUIDE

The mini-guide provides a brief description of the required plan components and a form to be completed and submitted to the county superintendent by March 1, 1995. The required development of a strategic plan by faculty senates provides school personnel with an opportunity to be involved in determining the direction and activities to be undertaken to appropriately manage the integration of exceptional students into the regular classroom. Completion and submission of a strategic plan is required by every faculty senate in West Virginia. The specific provisions of the legislation are described below.

The legislation requires that each faculty senate develop a strategic plan for the appropriate placement of exceptional students into the regular classroom. The provisions of the legislation pertaining to the faculty senate strategic plan are now included in the School Laws of West Virginia in Article §18-5A-5, which establishes faculty senates and describes their governance. Specifically, the major new provisions of §18-5A-5 require:

- Each faculty senate to develop a strategic plan for managing the appropriate integration of exceptional, or special needs, students into regular classrooms at its school. The strategic plan must be developed and submitted to the county superintendent of schools by March 1, 1995, and periodically thereafter pursuant to guidelines developed by the state department of education.

- Each faculty senate to encourage the participation of local school improvement councils, parents and the community at large in the development of the strategic plan.

- Each faculty senate to develop a strategic plan to include, at least, a) a mission statement, b) goals, c) needs, d) objectives and activities to implement plans relating to each goal, e) work in progress to implement the strategic plan, f) guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional needs students without diminishing the services rendered to the

other students in integrated classrooms, g) guidelines for the implementation of collaborative planning and instruction, and h) training for all regular classroom teachers who serve students with exceptional needs in integrated classrooms.

Each county school district must then file the integrated classroom strategic plans and training related to integrated education, and basic and specialized health care procedures, including the administration of medication with the state superintendent of schools in accordance with guidelines provided by the department of education. The guidelines for the submission of district integration plans are forthcoming and will be disseminated to each county superintendent.

Each component of the strategic plan is briefly described below. The strategic plan form is located on pages MG-6 and MG-7.

A. Mission Statement. The school's mission statement should be developed or, at least, reviewed and revised, if necessary, by the whole faculty senate and other stakeholders, i.e., other persons involved in or affected by the strategic plan activities, such as the school improvement council and parents of students with disabilities. The mission statement is based upon the vision and beliefs of the stakeholders and tells what the school does, for whom it is done, and how it is done.

B. Goals. A needs assessment must be completed prior to developing goals. After the needs assessment is completed, the faculty senate and other stakeholders must prioritize the identified needs. The needs ranked as high priorities define the areas in which goals should be developed. Often, a goal can be developed by rewriting the statement of need. ***Goals are long-range and should be written for a three to five year period of time.***

C. Needs. A needs assessment must be conducted prior to the development of the goals and remaining components of the strategic plan. At a minimum, the needs assessment should address the areas of staffing, collaboration and staff development. There are many needs assessment tools available or the faculty senate may want to create its own. This is a critical step in any strategic planning process, because effective strategic plans are based upon documented needs assessment data obtained from a variety of sources, such as teacher, student and parent surveys and analyses of achievement data. The major results of the needs assessment must be reported on the strategic plan form.

D. Objectives and Activities. The legislation requires that the plan include "objectives and activities to implement plans relating to each goal". The objectives are short-term and should describe what the school wants to accomplish in a year. The activities are the specific strategies that will be undertaken to achieve the objectives. The legislation requires that the faculty senate identify and record objectives and activities for each goal. To do so, additional copies of the strategic plan form may be utilized.

The objectives and activities of the strategic plan must address, at least, the areas of staffing, collaboration and staff development as prescribed by the legislation (refer to F, G and H below). For example, if the goal is "to increase the use of collaborative instructional approaches by staff", the following examples of objectives might apply:

1) regular and special education teachers will co-teach in the language arts block (staffing);
2) common collaborative planning time will be scheduled for teachers who are implementing co-teaching models (collaboration);
3) personnel development on collaborative teaching models and skills will be provided for all staff (staff development).

E. Evaluation. The legislation requires the faculty senate to describe the "work in progress to implement the strategic plan". In the initial strategic plan (due by March 1, 1995), the work in progress will be a part of the needs assessment. For example, if your school is just beginning to consider the integration of exceptional needs students into the regular classroom, the plan might describe factors that the faculty senate thinks can contribute to the appropriate integration of exceptional students, such as alternative instructional approaches being utilized with other students (Teach-Reteach or in-class interventions). If your school is successfully implementing collaborative instructional delivery strategies, then, this information would be reported in the needs assessment and the goals and objectives would focus on improving or expanding the implementation of those strategies, or on completely different areas.

The initial strategic plan must include evaluation strategies for determining if the objectives have been achieved and to what extent. The results of this evaluation will form the foundation of the needs assessment for the review and revision of the strategic plan. Evaluation data can be obtained from a variety of sources, such as parent, teacher and student surveys and analyses of student achievement data. For example, input pertaining to staff development activities and the results of the application of newly learned knowledge and skills will enable the faculty senate to determine what topics and type of personnel development activities need to be planned for the following year.

F. Staffing. The legislation states that the strategic plan shall include "guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional needs students without diminishing the services rendered to the other students in the integrated classrooms". To complete this component of the strategic plan, the faculty senate must develop objectives and activities related to the correct implementation of the special education process, particularly the development and implementation of the Individualized Education Program (IEP).

To comply with federal and state regulations pertaining to special education, the IEP Committee must develop an IEP that meets the needs of the exceptional student. Then, to determine placement in consideration of the least restrictive environment requirements, the IEP Committee

must first consider if that student can achieve satisfactorily in the regular education classroom with the provision of supplementary services and aids. Supplementary services and aids include, but are not limited to, direct instruction/therapy by special education personnel, support by a classroom aide, interpreters, large print books, assistive technology devices and classroom modifications, such as shortened homework assignments or oral tests. The supplementary services and aides to be provided to meet the needs of the student must be described on that student's IEP. Although the IEP Committee must consider the regular education classroom first, it can also consider other placement options on the continuum of services. This continuum of services includes regular education: full-time, regular education: part-time, special education: separate class, special education: special school, special education: out-of-school environment, and special education: residential facility. If the IEP Committee does determine that the student cannot achieve satisfactorily in the regular education classroom even with supplementary aids and services, then the justification for removal from the regular education environment must be documented.

The "guidelines for the placement of additional staff into regular classrooms to meet the needs of exceptional needs students without diminishing the services rendered to the other students in integrated classrooms" would be the objectives that describe a) how an exceptional needs student is assigned to the regular classroom(s) when the IEP Committee determines the regular classroom is an appropriate placement; b) how special education personnel (teachers, aides and therapists) will be scheduled into regular classrooms to provide the necessary supportive services to meet the needs of the exceptional needs student; and c) how collaborative models/approaches will be used to assure that the services rendered to the other students in the integrated classroom are not diminished.

G. Collaboration. The faculty senate must also include in the strategic plan "guidelines for the implementation of collaborative planning and instruction". These "guidelines" can take the form of objectives and activities that address the scheduling of common collaborative planning and instructional time for teachers and other staff, establishing and maintaining effective communication among staff members, and the process for selecting and implementing collaborative models or approaches.

H. Training. The legislation states that the faculty senate strategic plan shall include "training for all regular classroom teachers who serve students with exceptional needs in integrated classrooms". To develop this component of the strategic plan, the faculty senate should include staff development as an area to be evaluated in the needs assessment. The staff development objectives should reflect the training and other personnel development activities needed to achieve the goals and objectives of the strategic plan, especially the guidelines for the placement of additional staff into integrated classrooms and the implementation of collaborative planning and instruction.

Although the legislation only requires that the strategic plan address the training, or staff development, needs of the regular classroom teachers who serve students with exceptional needs in integrated classrooms, an effective strategic plan addresses the staff development needs of all school staff. For example, staff development on collaborative models and skills must be provided to regular and special educators together to positively affect student achievement.

Once the Strategic Plan is completed, the Faculty Senate Chair signs the plan and submits it to the county superintendent.

STRATEGIC PLAN FOR THE APPROPRIATE INTEGRATION OF EXCEPTIONAL STUDENTS INTO THE REGULAR CLASSROOM

School:_____ **Signature of Faculty Senate Chair:**_____

County:_____ **Name of Contact Person:**_____

Position:_____

***Mission Statement:**_____

_____

_____

****GOAL:**_____

*****Objectives**	**Activities**	**Timeline**	**Person Responsible**	**Evaluation**

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If more than one goal has been developed, use a **separate form for each goal.

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STRATEGIC PLAN FOR THE APPROPRIATE INTEGRATION OF EXCEPTIONAL STUDENTS INTO THE REGULAR CLASSROOM

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NEEDS ASSESSMENT: Write a brief summary of the needs assessment results **below or attach** a *summary report of the results.*

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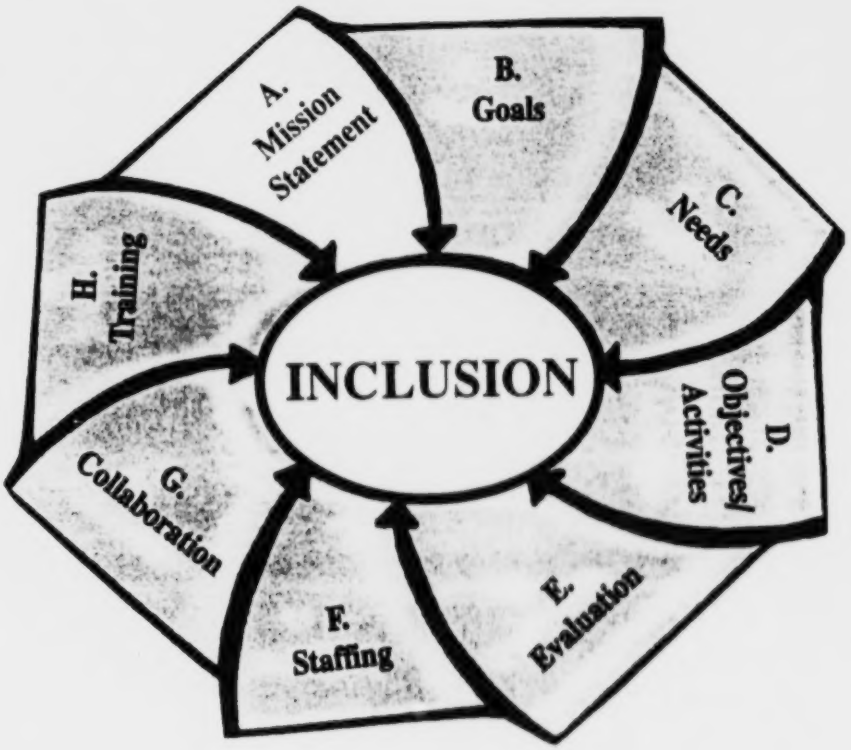


A. MISSION STATEMENT

A mission statement is a general, overall destination; an intended result or consequence. It is a broad and general description of purpose that can be motivational, inspirational, and directional. (Kaufman and Herman,1991)

SECTION A: MISSION STATEMENT

DEFINITION

A mission statement is a generall overall destination, an intended result or consequence. It is a broad and general description of purpose that can be motivational, inspirational and directional (Kaufman and Herman, 1991).

The mission statement provides the opportunity for all school staff to assume collaborative responsibility for the ultimate direction of the school, including the integration of exceptional needs students. It represents a commitment, a promise and a guide against which actions can be decided and progress can be measured. The mission statement sets the direction for leadership within each school.

CONCEPTS

The following major steps are needed to develop a **mission statement:**

STEP 1. Clarifying Beliefs and Values,

STEP 2. Developing the Vision, and

STEP 3. Formulating the Mission Statement.

DEVELOPMENT AND IMPLEMENTATION

STEP 1. Clarifying the Beliefs and Values

Clarifying the beliefs and values of an organization establishes the foundation for all group actions and forces discussion of the rules that are usually unspoken.

Belief statements are formal expressions of values, convictions and commitments that publicly declare what the organization aspires to be. They are collective statements of the school's personality which reflect deeply held positions or perceptions of what is important in teaching, learning and schooling. Belief statements provide the value system on which the remainder of the strategic plan will be built.

A group process activity for clarifying beliefs and values is described on page A-6. The group activity should be used with the faculty senate and other stakeholders. The group's common beliefs should only include those on which all members can agree or those with which all members can live. Using only commonly held and valued beliefs as the foundation for the strategic planning process increases group members' commitment to the process and its outcome.

Areas that may be considered in the identification of beliefs and values include students, colleagues, change, delivery systems, decision-making, education, teaching and learning. When clarifying values the group should focus on consensus and commitment. Refer to Sample Beliefs on page A-5.

STEP 2. Developing the Vision

A vision statement provides a broad focus for school improvement efforts. It is far more comprehensive than mission statements or statements related to goals, objectives or purpose.

The school's vision is comprised of statements that describe alternative desirable conditions to what currently exists. Developing a vision provides people an opportunity to imagine the very best their school can be. The vision identifies the direction to be taken in the implementation of the strategic plan.

Effective visions are inspiring, clear, stable but constantly challenging, empowering and focused (Peters, 1987).

In creating a vision, the following elements should be considered. Although every vision will not incorporate all of these elements, each vision should include as many as are appropriate.

- A vision is always in positive terms to develop an image of what might be; it does not address barriers, constraints or other negative influences.
- A vision is an imaginative description from which beliefs, values and goals can be inferred.
- A vision is focused some five to ten years in the future, which is a realistic view of the time needed to effect lasting change.
- A vision is a clearly focused visual picture of what we want to achieve that enables us to "see" ourselves enjoying our success.
- A vision is more vivid if all the sensory aspects - sights, sounds, aromas, feelings - are included.
- A vision must be clearly communicated to all individuals involved in or affected by the school's activities. (LEAD Project, 1986)

Refer to Sample Vision Statements on page A-7 and A-8 and the group process activity for developing vision statements on page A-9.

STEP 3. Formulating the Mission

Formulation of the mission statement is one of the most important aspects of strategic planning. The mission statement provides the bridge from the present to the future and sets the course of action for the school. It allows the school's future to be shaped, directed and coordinated through a shared and empowered vision of the future. The mission statement must be consistent with the beliefs, values and culture of the school and the community, reflect attainable goals and be the means, or "filter", by which all decisions are made.

A mission statement is broadly stated, declares the school's direction in reaching the vision and is an expression of the school's purpose and function. It should reflect an image of a desirable future state for the school, not the status quo.

The three essential components of mission statements are:

WHAT you do, or what the primary function of your school is;

WHO you do it for, or for whom the school performs its primary function; and,

HOW you do it, or how your school performs its primary function.

Another way to think about these three components is in terms of:

Who is the *Audience*?	(WHO - your primary clients)
What is the *Action*?	(HOW - the overall behavior in which you are engaged)
What is the *Aim*?	(WHAT - your purpose, or the outcome toward you work)

Mission statements may also include **why,** but this is an optional component.

The mission statement clearly and concisely states the school's purpose, usually in one or two sentences. A mission statement should be 100 words or less, although some believe that a mission statement should only be 25 words or less. Regardless of the exact number of words, the mission statement should be brief enough that most people, such as school staff members and parents, will remember it. To facilitate this remembrance and continually reinforce the focus on the school's purpose, the mission statement should be prominently displayed in the school building and printed in every school publication. Mission statements used in this way serve as motivators and rallying points for the staff, parents and other community members.

All public schools in West Virginia are required by the county accreditation standards to have a mission statement; consequently, the faculty senate and stakeholder group should review and revise, if necessary, the school's mission statement to:

a. assure it is consistent with the beliefs, values and vision of the group as determined in Steps 1 and 2 of this section;

b. determine its completeness in terms of the required components; and,
c. determine whether it clearly communicates its intent to all stakeholders.

Many schools' current mission statements will need very little, if any, revisions; however, some schools' mission statements may need to be rewritten on the basis of the input and involvement of all faculty senate members and other stakeholders. **It is very important that the formulation, or review and revision, of the mission statement be accomplished through the group process.** When all parties involved in and affected by the strategic planning process participate in this step, they will have a commitment to the successful implementation of the plan.

Refer to Sample Mission Statements on page A-10 and the activities for formulating, or reviewing and revising, mission statements on pages A-11 through A-13.

TOOLS

SAMPLE BELIEF STATEMENTS

Advocacy for students is the responsibility of all persons involved in the educational process.

Education must be measured in terms of individual achievement relative to ability.

Communication and collaboration among students, parents, school staff and community are essential to students' success.

Every individual student is capable of learning at a high level.

Educators deserve and benefit from quality professional development.

West Virginia's Integrated Education Initiative is based upon the following beliefs:

- Quality education reflects our diverse society and supports and promotes the success of all students.
- Education is a shared responsibility of families, educators and the community.
- Interaction with others fosters the life-long learning process.
- Each student's potential is better realized when a spectrum of educational opportunities occurs with age-appropriate peers in home school settings.

BELIEFS
ACTIVITY INSTRUCTIONS

INDIVIDUALLY

On the worksheet, **write** down ideas, words or statements of belief which you hold about education.

IN SMALL GROUP

Share your individual beliefs with each other. Ask each other questions to clarify what the statements mean and to discover why the beliefs are important.

List on a chart the beliefs on which all members of your group agree.

Select someone to share your group's belief statements with the large group.

IN LARGE GROUP

A representative from each small group will **share** that group's belief statements with the large group.

Members of other small groups will **ask** questions regarding why and for clarification.

Examine the beliefs for understanding. Make sure what is meant by each statement is understood by the entire group. Combine any duplicate or redundant beliefs.

Review the beliefs for agreement and clarification. Determine beliefs on which all the large group members can agree. Divide these common beliefs among the small groups for final editing.

Examine one belief at a time in the large group until consensus is reached on the intent and wording of each belief.

(LEAD Project, 1986)

SAMPLE VISION STATEMENTS

All faculty/staff assume greater responsibility for all student learning.

Self-managed teams of teachers implement a jointly created instructional program for all students.

Faculty, parents and community members actively participate in the decision-making process.

Students enjoy coming to school and are actively engaged in the learning process.

We see teachers meeting together, planning each day before and as children arrive. At each meeting, they discuss five individual students and their accomplishments. They review their daily schedules of team teaching and individual group activities. Students are laughing as they correct one another's homework and record their findings in a computer file, while their teachers complete their planning sessions. Community tutors are supervising this student activity. The cafeteria is busy with students helping to prepare a snack for the preschool students involved in after-school programs. The aroma permeates the hallways. Students with severe disabilities are leaving the school on local transportation with their job coach to shop in the local mall. Other students are leaving to study the local waste dump's effect on the wildlife in the area.

We see the principal teaching a small group about leadership skills. We also see teachers and older students evaluating individual student oral presentations on American authors and their works. As we leave the school, we see students making arrangements for weekend sleepovers and birthday parties. A disabled student is in tears. As we approach, we hear her say to her peer tutor that this is the first birthday party she has ever been invited to in her four years in school.

WEST VIRGINIA'S INTEGRATED EDUCATION INITIATIVE VISION

In the schools we seek, all children, from the less able to the most highly able, learn to use their minds well through challenging activities. All children move along at their own pace. All children feel that the adults around them expect success and will watch them closely to ensure success. The rich curriculum provides a center for, not the boundaries of, instruction. Teachers assume that adaptations and extensions will be needed for all children, based on their learning style, rate and level. Teachers have the capability and resources to provide those adaptations and extensions.

In the schools we seek, children whose learning abilities are markedly different receive the attention of all educators and are not the sole responsibility of special educators. Teachers and administrators with special expertise assist their colleagues in meeting diverse students' needs. The classroom organization and instructional strategies are designed for diversity. When the diversity is extreme, the school faculty, with advice from specialists, is inventive with arrangements and programs that match community and school resources with unique strengths and needs. All of the faculty who work with any exceptional student can articulate that student's unique strengths and needs and can describe how they are adapting and extending the curriculum based on those strengths and needs.

In the schools we seek, highly able students and less able students do not compete for resources. Achieving success for all students is not equated with achieving the same results. Faculty and administrators understand that the differences in abilities among students vary widely. They work to bring the community into the education of all children, but a special effort is made to draw the community toward children whose differences in ability require additional resources and support. Thus the community sees education of the most and least able as a challenge to be met, not as a problem that syphons off resources.

In the schools we seek, diverse abilities are not seen by students or teachers as being an embarrassment or a liability. By developing the potential of each student, the school encourages all students to recognize the value of achievement. By celebrating the accomplishments of all, the school models its rhetoric of academic excellence (Mitchell, 1990).

VISION
ACTIVITY INSTRUCTIONS

Directions: Sit back. Relax. Close your eyes. We are going to take a little trip into our educational future. The year is 2005. Imagine that you are taking a helicopter ride over your school and community. What would you want to see going on inside of those buildings? Once you have a clear vision of schooling in 2005, write it down on the worksheet. Then we will proceed with the activity described below.

INDIVIDUALLY

Once you have written your scenario, **select** key educational behaviors and characteristics in your vision (e.g. team teaching, cooperative learning, non-graded classrooms). List as many as you can.

IN SMALL GROUP

Share the key characteristics and behaviors which you each identified in your vision scenario with the other group members.

List on a chart the vision statements on which all members of your group agree.

Select someone to share the agreed upon vision statements with the large group.

IN LARGE GROUP

A representative from each small group will **share** that group's vision statements with the large group.

Examine the vision statements for understanding. Make sure members know what is meant by each statement. Combine any duplicate statements.

Review the vision statements for agreement and clarification. Determine the vision statements on which all group members can agree.

Examine one vision statement at a time until consensus is reached on the intent and wording of each vision statement. Compile agreed upon statements into the shared vision.

(LEAD Project, 1986)

SAMPLE MISSION STATEMENTS

The mission of **West Virginia's Integrated Education Initiative** is to provide all students a quality education in age-appropriate integrated academic, social, physical and community settings. These settings evidence that:

- educators, families, students and other community members plan and work together;
- all personnel accept the responsibility for the education of each child and work together to identify strengths, needs and characteristics of students for educational program purposes;
- all students are actively engaged in the learning process with their age-appropriate peers in their home school; and
- all students are involved in activities that are needs-based, individualized and relevant to successful functioning in society.

The mission of the **Office of Special Education Programs and Assurances** is to increase the knowledge, skills, competencies and resources of those who directly affect the lives of students with exceptionalities through proactive leadership and technical assistance. This mission is founded in the belief that all students will receive equal and quality educational opportunities when each exceptional student succeeds in the least restrictive environment that meets the student's needs.

The mission of the **Iowa School District** is to provide effective instruction in basic skills, to develop the potential of all students, to nurture a sense of individual worth and to build a foundation for lifelong learning in a changing world. The district, in partnership with the community, is committed to serve all students with academic, cultural, vocational and activity programs that meet the highest standards of educational excellence.

THE MISSION STATEMENT

Activity One

Directions: In your small group, examine the statement below and identify the three major components of a good mission statement:

- The Audience
- The Action
- The Aim

Our Mission

To provide effective instruction in basic skills, to develop the potential of all students, to nurture a sense of individual worth and to build a foundation for lifelong learning in a changing world. The district, in partnership with the community, is committed to serve all students with academic, cultural, vocational and activity programs that meet the highest standards of educational excellence.

Iowa School District

Who is the Audience?	(Answer: *all students*)
What is the Action?	(Answer: *to provide, nurture, develop and build*)
What is the Aim?	(Answer: *to serve*)

(LEAD Project, 1986)

THE MISSION STATEMENT

Activity Two

DIRECTIONS: Using the beliefs and values your group generated, formulate a mission statement that embodies the underlying beliefs, values and vision of your group.

INDIVIDUALLY	Using the worksheet, **write** ideas, words, pictures or statements of mission that you think are appropriate for your group.
IN SMALL GROUP	**Share** your statements with the others in your small group.
	Question to clarify the meaning of each group member's statements.
	List all the mission statements upon which your group can agree.
	Review the school's existing mission statement to determine if it: 1) conveys the same thoughts that your group's agreed upon statements do, or in other words, whether the school's mission statement is consistent with the stakeholders' beliefs and values; 2) includes the three essential components; and 3) communicates the school's purpose and direction clearly to all stakeholders, including parents.
	Revise the school' s mission statement or formulate a new one, if necessary.
	Select one person to share the revised/new mission statement with the large group.
IN LARGE GROUP	A representative from each small group will **share** that group's mission statement with the large group.

Examine each group's mission statement for understanding and clarity. Make certain everyone knows what each statement means.

Review each small group's mission statement to ensure that it reflects the beliefs and values agreed upon by the large group.

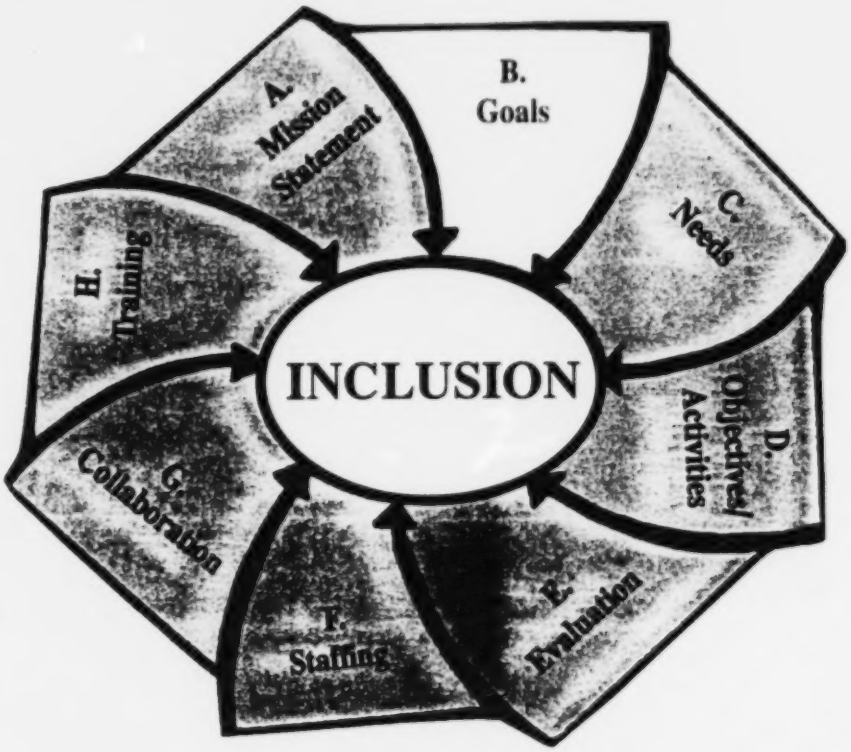
Agree upon the mission statements, or parts of mission statements, that are believed to be appropriate by all members of the large group.

Edit agreed upon statements into the shared mission.

(LEAD Project, 1986)

DO NOT RUSH THIS PART OF THE PROCESS.

This revised or newly formulated Mission Statement will serve as the foundation for the strategic plan. All the other activities in the strategic planning process and all the remaining components of the plan are based upon the mission statement.



B. GOALS

Goals, in the context of the planning process, are statements of long range intention, for a specific aspect of the organization. (Hines, 1991)

BEST COPY AVAILABLE

SECTION B: DEVELOPING GOALS

DEFINITION

In the context of the planning process, goals are statements of the long range intentions for a specific aspect of the organization (Hines, 1991). Goals are expressions of desired measurable outcomes, complement the mission statement, implement the vision, provide direction for the strategic plan and are consistent with the shared beliefs of the stakeholders.

CONCEPTS

Goals may be described as statements of where you want to go. They are broad statements concerning what is to be accomplished over an extended period of time, usually three to five years. The two basic components of goal statements include targeted primary areas and action verbs.

First, using the needs assessment results (Section C of this guide), identify the primary areas or critical issues relevant to the desired results established in the mission statement. **Secondly,** outline what has to be accomplished to meet the challenges identified in the primary areas/critical issues.

DEVELOPMENT AND IMPLEMENTATION

To develop goals in the identified priority area(s):

- Involve teachers and other stakeholders in the goal-setting process.
- Review the needs assessment data.
- Set performance goals based upon the prioritized areas generated as a result of the needs assessment process.
- Review goals to determine whether they each include an action verb and address a priority area/critical issue.

For the purposes of a school's strategic plan for the appropriate integration of exceptional needs students into the regular classroom, the goals should be for a period of **three to five years**. In an existing school improvement plan, one or more goals related to the inclusion of exceptional students may need to be added, if there are no goals in this priority area.

Refer to page B-2 for examples of goals that address integration of exceptional students.

TOOLS

SAMPLE GOALS

Establish and maintain positive partnerships with families, communities, local schools and legislators that support and enhance quality integration.

Increase the knowledge and skills of personnel who affect the lives of students with disabilities.

Provide a safe, disciplined environment that meets the educational needs of all students.

Encourage and promote an educational system which meets the diverse needs of all students.

Improve the effectiveness of educational services to enhance student achievements.

To achieve **West Virginia's Integrated Education Initiative** mission, the Office of Special Education Programs and Assurances has established the following goals.

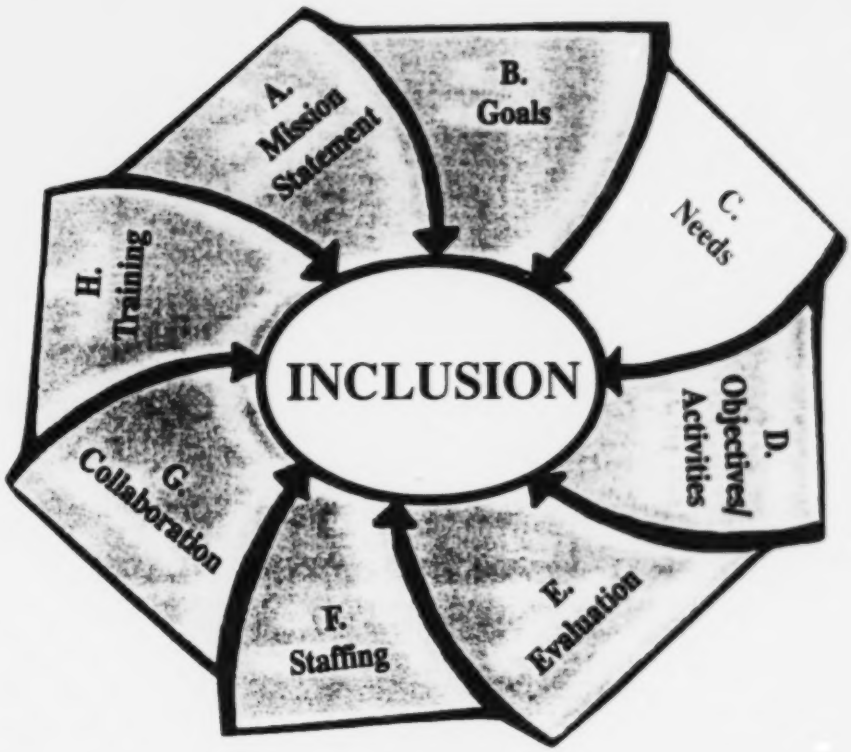
GOAL 1: Provide technical assistance designed to promote a unified system that fosters integration.

GOAL 2: Establish and maintain positive partnerships with families, communities, local schools and legislators that support and enhance quality integration sensitive to the individual differences of all students.

GOAL 3: Provide comprehensive training that supports integrated education.

GOAL 4: Utilize student-based funding that encourages integrated education.

GOAL 5: Develop and implement an accountability system to measure the outcomes of the Integrated Education Initiative.



C. NEEDS

A needs assessment collects information for making decisions about purpose, goals, and objectives and is an integral part of strategic planning. It is the process of identifying needs, placing them in priority order and selecting the needs to be reduced or eliminated. (Kaufman & Herman, 1991)

SECTION C. NEEDS ASSESSMENT

DEFINITION

A needs assessment collects information for making decisions about our purpose, goals, and objectives and is an integral part of strategic planning. It is the process of identifying needs (gaps between "What Is" and "What Should Be"), placing them in priority order and selecting the needs to be reduced or eliminated (Kaufman & Herman, 1991).

The identification of needs provides:

- performance data;
- a basis for developing the goals, objectives and activities of the plan;
- consequences to the values, beliefs, vision and mission;
- an opportunity to proactively identify potential conflicts; and
- a forum to resolve conflicts.

CONCEPTS

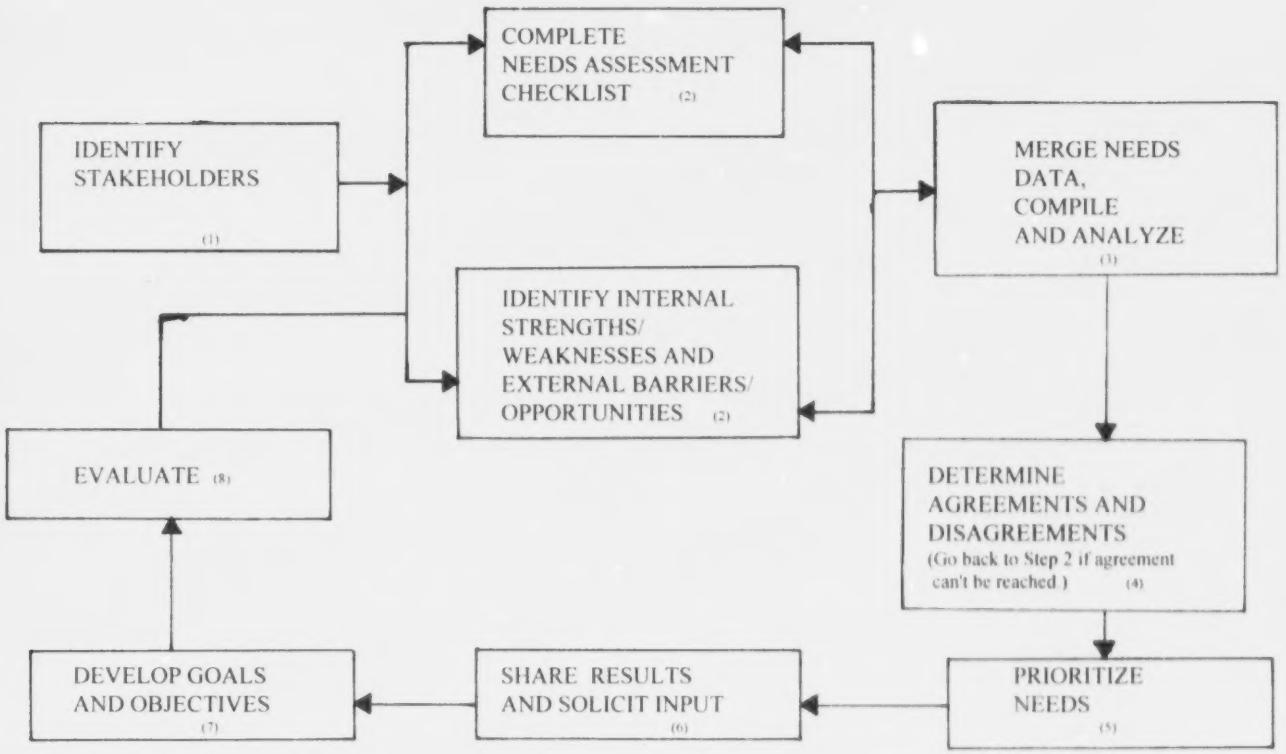
Needs assessments provide results-based information required to identify gaps between actual and desired (or required) results. It uses both judgement-based and performance-based results. Judgement-based data are usually qualitative and may include: 1) personal perceptions; and, 2) collections of beliefs, values and visions. Performance-based data are usually quantitative and may include: 1) demographic information; 2) test results; 3) promotion and/or retention rates; and, 4) grievances and lawsuits. Additional examples may be obtained in Kaufman and Herman (1991).

The following steps must be completed to implement a comprehensive needs assessment process:

1. Conduct an internal and external environmental scan;
2. Complete a needs assessment utilizing a formal tool/instrument;
3. Compile and analyze results;
4. Identify agreed upon needs;
5. Prioritize the needs; and,
6. Share results and solicit input.

A flow chart of the comprehensive needs assessment process follows.

NEEDS ASSESSMENT PROCESS


COMPLETE NEEDS ASSESSMENT CHECKLIST (2)
IDENTIFY STAKEHOLDERS (1)
MERGE NEEDS DATA, COMPILE AND ANALYZE (3)
IDENTIFY INTERNAL STRENGTHS/ WEAKNESSES AND EXTERNAL BARRIERS/ OPPORTUNITIES (2)
EVALUATE (8)
DETERMINE AGREEMENTS AND DISAGREEMENTS (Go back to Step 2 if agreement can't be reached) (4)
DEVELOP GOALS AND OBJECTIVES (7)
SHARE RESULTS AND SOLICIT INPUT (6)
PRIORITIZE NEEDS (5)

DEVELOPMENT AND IMPLEMENTATION

Although W.V. Code §18-5A-5 requires that each faculty senate develop a strategic plan, the school should utilize a broader representative group for completing the needs assessment. By having a cross-representation of school personnel, support personnel, parents and the community, specific strategies and resources that meet technical assistance needs across multiple areas can be determined. This can be helpful in making judicious use of training and staff development resources.

1. Conduct Internal and External Environmental Scan

   The organization's external barriers and opportunities and internal strengths and weaknesses must be analyzed by stakeholders in order to develop an effective strategic plan. Major and minor external trends, issues and events need to be identified and documented, as well as internal inputs, processes and outputs through the scanning process.

A. External Analysis

Stakeholders should look outside the school environment (e.g. district, state, national) and identify the events or conditions that may affect the school in implementing its mission statement. Categories of influence in the external analysis may include:

- social
- political
- demographic
- economic
- technologic
- educational trends and developments

B. Internal Organizational Analysis

Stakeholders analyze the human and organizational strengths and weaknesses of the school that will contribute to or restrict the realization of the mission statement.

Through external and internal analysis, broad statements of needs will emege that can be converted into goal statements.

Greenblat and Duke (1981) developed a brainstorming activity for identifying the internal and external strengths, weaknesses, barriers and opportunities for the school organization. This activity generates answers to four questions posed to the group. Each answer is written on an index card called a "snow card". The answers are then grouped into categories with common themes. The cards can then be taped to a wall according to similar themes. Instructions for the "snow card" activity are provided on page C-5.

2. Complete Needs Assessment Utilizing Formal Tool/Instrument

Stakeholders should also complete some type of formal needs assessment instrument. A sample of formal tool/instrument for conducting a needs assessment at the building level is found on pages C-6 through C-11 of this section. This checklist was developed by the California Research Institute as part of a federally funded cooperative agreement to conduct research related to inclusion and to support the inclusion of students with severe disabilities through technical assistance to sixteen (16) system change project states.

3. Compile Results and Analyze

Upon completion of a formal needs assessment instrument and the external and internal environment scan, the planning team (see Introduction) compiles the results.

The team should look for patterns to identify the strategic issues. According to Kaufman and Herman (1991): "Needs analyses find the causes and reasons behind the existence of the needs."

4. Identify Agreed Upon Needs

After analyzing the data gathered through the needs assessment process, decisions must be made as to what constitutes a need. If the Effective Practice Checklist (pages C-6 through C-11) was utilized, those practices given the highest ranking by stakeholders should be considered a need. If there is a disagreement in the results or among the planning team members, more data collection may be necessary. Additional quantitative data may also assist in clarifying reality and may help to resolve differences among team members.

5. Prioritize Needs

Upon completion of the needs assessment, the planning team should prioritize which needs warrant immediate attention and communicate the results to the faculty senate for further analysis. The faculty senate should identify the matches and mismatches among the needs and the vision, beliefs, and mission. The faculty senate must consider the cost of addressing the need. Additionally, the faculty senate must consider the fiscal and social ramifications of not addressing the need. Some methods for obtaining agreement on priority areas include objective discussion, vote taking and a nominal group technique which relies on consensus building. After agreement is reached, the faculty senate should identify the priority items which must be addressed first.

During this step in the process, the faculty senate should:

- Identify the items which have been rated as highest priorities;
- Focus planning efforts and resource allocations;
- Simplify communication by removing unnecessary information; and,
- Emphasize information relative to priorities.

6. Share Results and Solicit Input

Share the results of the needs assessment with the stakeholders who originally completed the needs assessment checklist, if a larger group than the faculty senate was utilized. Solicit their input relevant to selecting the strategies to be employed to implement each of the prioritized practices. A list of effective building level strategies which corresponds with the needs assessment checklist (pages C-6 through C-11) can be found on pages C-12 through C-31.

TOOLS

INTERNAL AND EXTERNAL ENVIRONMENT SCAN
SNOW CARD ACTIVITY INSTRUCTIONS

The "snow card" activity should be completed by focusing on the following questions:

- What major external opportunities do we have?
- What major external barriers do we face?
- What are our major internal strengths or positives?
- What are our major internal weaknesses or problems?

The guidelines for using the "snow card" technique are:

- Choose a facilitator.
- Form groups of 6-12 individuals to participate.
- Members of the group should be seated around a table near a wall.
- Each individual silently brainstorms possible answers to the first questions and records each answer on a separate index card.
- Repeat brainstorming for each of the remaining three questions.
- Each individual chooses the three "best" answers to each question (12 cards total).
- The facilitator collects and shuffles cards, then tapes them to the wall.
- The group rearranges the cards into thematic clusters (e.g. staffing, training or resources).
- The group reviews the placement of the cards to determine whether or not they have been placed in the appropriate category. It may be necessary to establish new categories or subcategories.
- Have cards typed in outline or chart form.

(Bryson, 1988)

The results of this activity should be utilized along with the results from a formal needs assessment instrument in formulating broad statements of need. These needs will be converted into goal statements (see Section B).

THE EFFECTIVE PRACTICE CHECKLIST FOR THE BUILDING LEVEL

Background

This Checklist was developed by the California Research Institute on the basis of input from federally funded integration projects in 16 states. Some of the practices may not be appropriate nor applicable to every school. The checklist items reflect effective practices for improving educational opportunities for all students and are founded in the principles and strategies of education reform. The focus of the practices is to create an inclusive school where all children are valued and the needs of **all** students are appropriately met through a variety of instructional strategies and other activities.

Terminology

A brief explanation of the following terms will help the faculty and others to better understand some of the effective practices use in the checklist.

- ***"General education setting"*** refers to all the settings in a regular education environment not just the regular education classroom.

- The term ***"age-appropriate"*** reflects the federal requirement that students with disabilities to be educated with their age appropriate, nondisabled peers. This means that students with disabilities must be in schools/environments where nondisabled students of similar chronological ages are served; however, it does not mean that all students with disabilities must always be in the regular classroom. An IEP Committee determines on an individual basis whether it is appropriate for an exceptional needs student with disabilities to be in the regular classroom and to what extent.

- Whenever the terms ***"integration"*** or ***"inclusion"*** are used, they refer to ***appropriate integration or inclusion***. The Department of Education does not support, encourage nor condone inappropriate integration, or the "dumping", of exceptional needs students in the regular classroom without the necessary services and supports. **Appropriate inclusion, or integration,** therefore, occurs only when the supplementary services and aids an exceptional student needs to achieve satisfactorily in the regular classroom as provided.

- Effective practices in the Checklist that contain phrases such **as access to or participation in all activities,** reflect the requirement that all students with disabilities must be assured equal access/opportunities to participate in all activities. However, the extent of a student's participation in regular education classes and activities is determined by the IEP Committee.

Other terms used in the Checklist, i.e., **natural proportions, home school, natural setting** and **natural supports,** are defined on page I-8.

Instructions

Recommendations and directions for using the Effective Practice Checklist are located on page I-8. This Checklist is a sample needs assessment tool and can be used in several ways: in its entirety, only certain components or selected indicators, or indicators can be modified or added to reflect issues of importance to a school community. If the Effective Practice Checklist is not used, the faculty senate can use other available needs assessment instruments or design its own. It is important that some type of a formal needs assessment tool can be used in conducting the required needs assessment.

Once priority needs have been identified using the Effective Practices Checklist or another needs assessment instrument, objectives to address the priority needs must be developed. Once the objectives have been developed, then, appropriate and reasonable activities for accomplishing the objectives can be identified. The Effective Building Level Practices and Supportive Strategies (pages C-13 through C-32) correspond to the areas and the effective practices on the Effective Practice Checklist (pages C-7 through C-12). If this Checklist is used, find the corresponding practice and strategies on pages C-13 through C-32 to develop the objectives and activities for the strategic plan. The corresponding practice can be used/modified to formulate the objective and strategies can be selected as the activities for each objective. Even if this Checklist is not used, the Effective Building Level Practices and Supportive Strategies may be helpful in developing the objectives and activities for the strategic plan. The practices and strategies listed are not exhaustive and are only examples. "Brainstorming" additional strategies can result in the identification of innovative and creative ways, which are unique to a particular school, to accomplish the goals and objectives of the strategic plan.

SCHOOL:_____ REVIEWERS:_____

DISTRICT:_____ _____

_____

EFFECTIVE PRACTICE CHECKLIST - BUILDING LEVEL

EFFECTIVE PRACTICE	*STATUS			PRIORITY
	DATES	DATES	DATES	
LEADERSHIP AND SUPPORT Part 1: School Mission/Philosophy 1.1 The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2] 1.2 The school philosophy emphasizes responsiveness to families and encourages active family involvement.[2] 1.3 The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.[2] Part 2: Administrative Responsibilities & Staff Supervision 2.1 The principal is ultimately responsible for program implementation including staff supervision and evaluation. 2.2 Special and general education teachers are responsible for: - Attending faculty meetings. - Participating in supervisory duties (e.g., lunch/bus/yard duty). - Participating in extracurricular activities (e.g., chaperon dances, work with student clubs). - Following school protocol; keeping principal or appropriate administrator informed on an ongoing basis. 2.3 There is a defined plan and/or process for supporting staff in implementation (i.e., time for team planning meetings, opportunities for staff development).				

*Status Key: 1=Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

EFFECTIVE PRACTICE	*STATUS			PRIORITY
	DATES	DATES	DATES	
PROGRAM PLANNING AND IMPLEMENTATION Part 3: IEP Development 3.1 Instructional staff and related service providers complete a functional assessment as an initial step in IEP development. 3.2 Activity-based evaluations of student interests and family priorities are part of the functional assessment. 3.3 Student programs are developed across the following curricular content areas: - Communication/Socialization - Personal Management (includes Self Determination) - Recreation/Leisure - Home/Domestic - General Education/Academic - Transition/Vocational 3.4 Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives. 3.5 IEPs include personal management objectives to promote student self-advocacy (i.e., decision-making, choice-making, individual responsibility). 3.6 IEP objectives are developed with families and reflect family priorities. 3.7 Student IEPs include instruction of functional activities in age-appropriate school and community settings. 3.8 IEP objectives reflect interaction with nondisabled peers.				

*Status Key: 1= Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

EFFECTIVE PRACTICE	*STATUS			PRIORITY
	DATES	DATES	DATES	
3.9 IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult roles.				
3.10 IEP/placement teams use natural proportion guidelines when placing students with disabilities in general education classrooms.				
3.11 The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.				
3.12 The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.				
Part 4: Collaborative Teamwork				
4.1 Teams meet weekly to plan instructional support services for all students.				
4.2 The team collaborates to: 1) develop peer network/interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make material and environmental adaptations; and 4) provide physical assistance as needed.				
4.3 Teams collaborate to provide related services in inclusive settings.				
4.4 Teams initiate systematic transition planning to support successful transition from one program to another.				
4.5 Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.				
4.6 Teams assist families in accessing community resources.				

*Status Key: 1= Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

EFFECTIVE PRACTICE	*STATUS			PRIORITY
	DATES	DATES	DATES	
Part 5: Professional Practices				
5.1 All instructional staff work with students in age-appropriate general education and community settings.				
5.2 Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.				
5.3 Instructional staff and related service providers develop adaptations for individual students to facilitate independence which are useful across environments.				
5.4 Instructional staff plan activities using materials, instructional procedures and environments that are age-appropriate and individualized.				
5.5 Instructional staff adapt instructional strategies in academic and/or community-referenced content areas to meet IEP objectives.				
5.6 Instructional staff incorporate ability awareness into general education curriculum on diversity and the human experience.				
5.7 Instructional staff and related service providers ensure interaction with nondisabled peers in all activities.[1]				
5.8 Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related service personnel and other team members.				
5.9 Instructional staff demonstrate positive attitudes toward students.[1]				

*Status Key: 1= Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

EFFECTIVE PRACTICE	*STATUS DATES	*STATUS DATES	*STATUS DATES	PRIORITY
STUDENT INCLUSION Part 6: Student Activities 6.1 Students have access to all school environments for instruction and interactions.[1] 6.2 Students participate in and are included in activities such as:[1] - music - general education classes - art - home economics - library - work experience - gym - recess/break - lunch - computer use - assemblies - graduation exercises - clubs - field trips 6.3 Students with disabilities are involved in extracurricular school activities such as:[1] - clubs - scouts - dances - after school recreation/day care programs Part 7: Interaction with Peers 7.1 Students' instructional programs incorporate interaction with nondisabled students in the following areas:[1] - General Education/Academic - Home/Domestic - Personal Management (includes Self Determination) - Recreation/Leisure - Transition/Vocational - Communication/Socialization				

*Status Key: 1= Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

EFFECTIVE PRACTICE	*STATUS			PRIORITY
	DATES	DATES	DATES	
7.2 Students are involved with age-appropriate, nondisabled peers in structured interaction programs such as:[1] - Peer tutoring in school and community environments - "PALS" (Partners at Lunch) or lunch buddies - Circle of Friends - Co-worker support at job training site - MAPS - General education class activities				
7.3 Social interaction programs are:[1] - Well organized - Positive in orientation (emphasizing students' strengths, focusing on functional activities) - Supported by principal, faculty, and parents - Viewed as a positive experience by students				

*Status Key: 1= Practice is effectively implemented; 2=Practice is implemented but needs improvement; 3=Practice is not implemented

1. The majority of the effective practice items contained in this checklist have been adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

2. These effective practice items have been taken or adapted from: Meyer, L. H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of the Association for Persons with Severe Handicaps, 12 (4), 251-263.

3. These effective practice items have been taken or adapted from: Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illnois State Board of Education: Project CHOICES/Early CHOICES, S.A.S.E.D.

EFFECTIVE BUILDING LEVEL PRACTICES AND SUPPORTIVE STRATEGIES[1]

LEADERSHIP AND SUPPORT

Part 1: School Mission/Philosophy

1.1 **Practice:** The school develops and disseminates a mission statement which reflects the philosophy that all children can learn and the school is responsible for serving them.[2]

Strategies:

Form or utilize an existing school improvement committee, which includes representation from parents, students, teachers, school administration, related services staff, school advisory council, and the community, to address inclusion.

Develop a shared vision for change and inclusion based on desired student outcomes.

Develop the mission statement incorporating the following components: a definition of inclusion, a rationale for implementing inclusive educational programs, a belief or vision statement, a brief outline of administrative policies that support inclusive practice, and recommended strategies and procedures for implementation.

Discuss the school inclusion mission statement with the PTA, school staff, and other interested key stakeholders.

Request that key stakeholders disseminate the inclusion mission statement to their constituent groups.

1.2 **Practice:** The school philosophy emphasizes responsiveness to families and encourages active family involvement.

Strategies:

Form a school improvement committee which includes representation from parents, students, teachers, school administration, related service staff, school advisory council, and the community.

Involve interested parents in planning and evaluating inclusion at the site level (e.g., via school site councils, inclusion task forces, student planning teams, etc.).

Include interested parents in all inservice training activities (as both participants and trainers).

Involve PTA in inclusion efforts.

Communicate regularly with parents.

1.3 **Practice:** The school philosophy supports the need for ongoing inservice training, staff development, and technical assistance.[2]

Strategies:

Conduct inservice training needs assessments across parents, teaching and instructional staff, related services personnel, and administrators.

Incorporate inclusion topics into the school's comprehensive inservice plan with suggestions from school personnel.

Work with the local university community to address inservice needs.

Provide opportunities for inservice training providers to interact with one another at site and district levels.

Develop a district level support team to guide training efforts for the school community.

Provide opportunities for teachers, staff, and parents to visit model inclusive programs in the district or elsewhere.

Keep faculty informed about inclusive classes (e.g., staff presentations, regular faculty meetings).

Include articles about inclusion in the school newspaper to highlight the importance of inclusion to students, parents, and school personnel and to share successful strategies.

Provide information about inclusion in newsletters to all parents.

Part 2. Administrative Responsibilities and Staff Supervision

2.1 **Practice:** The principal is ultimately responsible for program implementation including staff supervision and evaluation.

Strategies:

Review existing service delivery plans and adminstrative responsibilities related to chain of command, staff supervision, and evaluation; then modify plan to support building-based ownership of inclusive practice.

Ensure that all school personnel, including special education and related services staff, share common information concerning school rules and protocol.

Schedule special education staff for the same lunch periods and preparation periods as general education staff.

Provide leadership training for principals to enhance their skill in supervising all programs.

Design the master schedule to include all students and instructional personnel, and to accommodate team meetings and planning periods.

Merge special education personnel with general education teams to foster shared responsibility and collaboration.

Develop a building-level implementation guide for collaboration and inclusion outlining the roles, responsibilities, and process for teaming to individualize student programs following the first school year.

2.2 **Practice:** Special and general education teachers are responsible for:

- Attending faculty meetings.
- Participating in supervisory duties (e.g., lunch/bus/yard duty).
- Participating in extracurricular activities (e.g., chaperon dances, work with student clubs.).
- Following school protocol by keeping the principal or appropriate administrator informed on an ongoing basis.

Strategies:

Ensure that special education is part of the overall school restructuring plan.

Ensure that all school personnel, including special education and related service staff, share common information concerning rules and protocol.

2.3 **Practice:** There is an ongoing process to support staff in implementing inclusive practices (i.e., time for team planning meetings, opportunities for staff development).

Strategies:

Review existing service delivery plans and administrative responsibilities related to chain of command, staff supervision, and evaluation; then modify to support building-based ownership of inclusive practice.

Examine alternatives for redeploying existing resources, if necessary, to provide for itinerant support (i.e., alternative staffing patterns.).

Provide release time support for preparation activities (e.g., team building and planning, instructional strategies).

Survey staff to determine their interest in and need for organized disability awareness education for themselves and for their students.

Examine within the district for resources for training (i.e., identify local expertise).

Use mentor or lead teachers to conduct inservice training and set up peer coaching systems to maintain and reinforce instructional skills.

Include the total school community in collaboration training.

Evaluate the impact and utility of the inservice training activities on student outcomes.

PROGRAM PLANNING AND IMPLEMENTATION

Part 3. IEP Development

3.1 **Practice:** Instructional staff and related service providers complete a functional assessment as an initial step in IEP development.

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel which addresses functional assessment.

Obtain/develop material and human resources for technical assistance on functional assessment strategies.

Develop a manageable student data collection system for use by general education personnel and/or instructional teams.

Discuss grading and assessment practices and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

3.2 **Practice:** Activity-based evaluations of student interests and family priorities are part of the functional assessment.

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel to address functional assessment.

Select or develop a structured family interview procedure.

Include parents as members of ongoing student planning teams.

3.3 **Practice:** Student programs are developed across the following curricular content areas:

- General Education/Academic
- Communication/Socialization
- Personal Management (includes Self Determination)
- Recreation/Leisure
- Home/Domestic
- Transition/Vocational

Strategies:

Develop and implement a comprehensive inservice plan across all domains with the parents of students with disabilities and school site personnel (i.e., social relationships, adapting curriculum, cooperative learning, functional assessments).

Obtain/develop technical assistance on adapting curriculum,, use of natural supports, delivering instruction in community settings, scheduling staff, training job developers, and site management.

Use mentor or lead teachers to conduct inservices and serve as peer coaches.

Set up peer coaching systems to maintain and reinforce instructional skills.

Examine building policy for barriers to going off-site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct inventories of community and school environments which are identified by parents via the parent interview process.

Involve related service staff in functional assessments and community-based instruction.

Develop a rotational job sampling program for secondary students.

Coordinate use of job sites across district to avoid seeking duplicate jobs.

Develop a student peer support system (i.e., utilizing natural supports).

Identify and utilize existing generic vocational education opportunities in the district.

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

3.4 **Practice:** Parents, general and special education teachers, related service personnel, and students collaborate to write joint IEP goals and objectives.

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel which addresses team collaboration issues.

Employ a collaborative process for group decision-making.

Utilize MAPS or similar personal futures planning techniques.

Include parents as members of ongoing student planning teams.

3.5 **Practice:** IEPs include personal management objectives to promote student self-advocacy (i.e., decison-making , choice-making, individual responsibility).[2]

Strategies:

Include student in IEP development and decision-making.

Ensure that student preferences are reflected in IEP goals and objectives.

3.6 **Practice:** IEP objectives are developed with families and reflect family priorities.

Strategies:

Select or develop a structured parent interview procedure for use by site personnel and families.

Review and discuss the parent interview priorities as a team to negotiate issues that may arise when school and family priorities differ.

3.7 **Practice:** Student IEPs include instruction of functional activities in age-appropriate school and community settings.

Strategies:

Obtain/develop technical assistance resources on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Examine building policy for barriers to going off-site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct inventories of community and school environments which are identified by parents via the parent interview process.

Involve related service staff in functional assessments and community-based instruction.

Develop a rotational job sampling program for secondary students.

Coordinate use of job sites across district to avoid seeking duplicate jobs.

Develop a student peer support system (i.e., utilizing natural supports).

Identify and utilize existing general vocational education opportunities in the district.

3.8 **Practice:** IEP objectives reflect interaction with nondisabled peers.

Strategies:

Obtain technical assistance on cooperative learning, adapting curriculum., use of natural supports, staff scheduling, and facilitating social interaction and social relationships.

Implement school site practices which promote the development of peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Develop a peer support system (i.e., MAPS, peer tutoring, Circle of Friends, etc.).

3.9 **Practice:** IEPs for students age 14 and older include objectives that address skills and services needed to support transition to adult life.

Strategies:

Involve relevant adult service agencies in transition planning within the IEP process.

Obtain/develop technical assistance on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Focus on a variety of community-based vocational experiences for exploration and assessment.

Identify and utilize existing general vocational education opportunities in the district.

Provide supports and adaptations needed to maintain community vocational education opportunities.

3.10 **Practice:** IEP teams use natural proportion guidelines when serving students with disabilities in general education classrooms.

Strategies:

Define the process for establishing inclusive classes and address issues such as heterogeneity, age-appropriateness of school for students, home/magnet schools, and geographic location.

Develop plans and timelines for establishing inclusive programs across ages and school levels (elementary/middle school/high school/post secondary).

Develop a process for transition between classes and schools at the school site and district level through the instructional planning or building level team process.

Compile information on attendance area for each student and begin a process for returning students to home schools as appropriate.

Utilize heterogeneous grouping in classroom, school and community environments as appropriate.

Review the organization and assignment of related service personnel and develop guidelines to ensure that related services are provided in naturally occurring classroom and community contexts.

3.11 **Practice:** The supports, aids, curricular modifications and other instructional methods required for the student to be successful in school and community settings are discussed during IEP meetings using a transdisciplinary approach.[3]

Strategies:

Develop and implement a comprehensive inservice plan across all domains with the parents of students with disabilities and school site personnel (i.e., social relationships, adapting curriculum, cooperative learning, functional assessments).

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation, role release, and adapting curriculum.

Use mentor or lead teachers and related service personnel to conduct inservices and serve as peer coaches.

3.12 **Practice:** The supports, aids, curricular modifications, and other instructional methods outlined in the IEP are implemented and updated according to the student's progress.[3]

Strategies:

Obtain/develop technical assistance resources on adapting curriculum, use of natural supports, delivering instruction in community settings, scheduling staff, and training job developers.

Develop a manageable student data collection system for use by general education personnel and/or instructional teams.

Discuss grading and assessment practices and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

Part 4. Collaborative Teamwork

4.1 **Practice:** Teams meet weekly to plan instructional support services for all students.

Strategies:

Develop building-level implementation guide for collaboration, which outlines the roles, responsibilities, and process for teaming, to facilitate individualized student programs.

Provide periodic release time for team preparation activities (e.g., team set up and planning; the development of school and community inventories).

Ensure that scheduling and existing coverage enable transdisciplinary teams including parents to meet on a regular basis (i.e., rotating substitute teachers, teacher preparation periods, block scheduling).

Develop and implement a comprehensive inservice plan with parents of students with disabilities and school site personnel.

4.2 **Practice:** The team collaborates to: 1) develop peer network interactive systems; 2) adapt learning objectives for students within the context of the core curriculum; 3) make materials and environmental adaptations; and 4) provide physical assistance as needed.

Strategies:

Conduct inservice needs assessments across all targeted audiences.

Use mentor or lead teachers or related services staff to conduct inservices and serve as peer coaches.

Obtain technical assistance on adapting curriculum.

Ensure that students receive necessary levels of support when participating in general education (e.g., therapy, paraprofessional support, adaptations, natural supports) , and fade supports when they are not required.

4.3 **Practice:** Teams collaborate to provide related services in inclusive settings.

Strategies:

Form interagency groups to develop inclusive options at the preschool and post school level with representation from the early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation and role release.

Set up peer coaching systems to maintain and reinforce related service delivery to students in inclusive contexts.

Review the organization and assignment of related service personnel. Design and use a collaborative related services delivery model and provide therapy in inclusive settings.

Reorganize related service personnel's schedules to allow for providing services in natural settings (i.e., block scheduling).

4.4 **Practice:** Teams initiate systematic transition planning to support successful transition from one program to another.

Strategies:

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Outline the transition process between classes and schools at the school site level.

Examine site policy for barriers to going off-site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Conduct a team meeting to develop the Individualized Transition Plan (ITP). Assign responsibilities and timelines to each team participant.

Include vocational training objectives for specific job sampling in the IEPs of students age 14 and older.

4.5 **Practice:** Team members meet informally with one another to discuss ongoing inclusion issues and maintain continuous communication.

Strategies:

Involve all parents of students with disabilities in all school activities, such as student planning teams, parent/teacher conferences, and receiving general school mailings regarding school events.

Merge special education personnel with general education teams to foster shared responsibility and collaboration.

Schedule special education staff for the same lunch periods and preparation periods as general education staff.

4.6 **Practice:** Teams assist families in accessing community resources.

Strategies:

Provide families with a listing of community resources and specialized service systems.

Provide families with support from team members in securing needed resources.

Part 5. Professional Practices

5.1 **Practice:** All instructional staff work with students in age-appropriate general education and community settings.

Strategies:

Ensure that the policy on paraprofessionals allows them to implement teacher-designed instruction away from the presence of certificated staff.

Examine building policy for barriers to going off-site (i.e., liability, training, transportation, fiscal issues, supervision) and then develop a policy and procedures guide which adheres to district policies.

Form interagency groups to develop inclusive options at the preschool and post school level with representation from early childhood lead agency, school district, community college, vocational rehabilitation, business community, parents, and self-advocates.

Conduct inventories of community and school environments which are identifed by parents via the parent interview process.

Identify and utilize existing generic daycare and preschool opportunities in the district.

Develop a rotational job sampling program for secondary students.

Identify and utilize existing general vocational education opportunities in the district.

5.2 **Practice:** Related services staff provide services in general education classrooms and in community settings using transdisciplinary and consultative approaches.

Strategies:

Review the organization and assignment of related service personnel. Design and use a collaborative related services delivery model and provide therapy in inclusive settings.

Develop inservice training for teams which include parents, instructional staff, and related service staff. Focus on issues such as collaborative consultation skills, role release, and adapting curriculum.

Set up peer coaching systems to maintain and reinforce instructional skills used to support included students.

5.3 **Practice:** Instructional staff and related service providers develop adaptations for individual students to facilitate independence across environments.

Strategy:

Schedule multiple opportunities for students to demonstrate skills across environments, trainers, and activities.

5.4 **Practice:** Instructional staff plan activities using materials, instructional procedures, and environments that are age-appropriate and individualized.

Strategies:

Obtain/develop technical assistance on cooperative learning.

Utilize heterogeneous groups in classroom, school, and community environments.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Discuss grading and assessment practices, and explore mastery and performance-based assessment strategies for all students (i.e., portfolio assessment).

Ensure that students receive report cards at the same intervals as their peers.

5.5 **Practice:** Instructional staff adapt instructional strategies in academic and/or community-referenced content areas to meet IEP objectives.

Strategies:

Obtain/develop technical assistance on adapting instruction and curriculum.

Set up peer coaching systems to maintain and reinforce instructional skills used to support included students.

Use mentor or lead teachers to conduct inservices and serve as peer coaches.

5.6 **Practice:** Instructional staff incorporate disability awareness into general education curriculum on diversity and the human experience.

Strategies:

Survey staff to determine their interest in and need for organized disability awareness education for themselves and for their students.

Include articles about inclusion in the school newspaper before and after these programs are implemented.

Provide information about inclusion in newspapers to all parents.

Schedule presentations by guest speakers who are individuals with disabilities.

Infuse issues on disabilities and diversity within the general education curriculum.

Select media (e.g., library books, films) about successful people with disabilities.

5.7 **Practice:** Instructional staff and related service providers ensure interaction with nondisabled peers in activities.

Strategies:

Conduct building level inservice training on strategies to facilitate social interaction.

Obtain/develop technical assistance on cooperative learning, adapting curriculum, natural supports, and facilitating social relationships.

Implement school site practices to promote the development of peer relationships (e.g., inclusion in activities across environments, transportation schedule and coordinated school hours, etc.).

Establish mechanisms and procedures for creating structured interaction programs (e.g., peer tutoring, circles of friends) involving general education students (site-based work experience, service credits, elective courses where appropriate).

Utilize natural supports to facilitate social interaction (i.e., enlist support from peers in the general education classroom).

Examine each aspect of the program to determine naturally occurring opportunities for interaction.

Use adaptations of MAPS and Circle of Friends to develop peer friendships and natural supports.

Enlist student participation in instructional and school planning teams to identify existing clubs and extracurricular activities (e.g., utilize the Student Council in developing peer support).

Involve the special education teachers in using their expertise to sponsor clubs and include students.

Examine the role of the paraprofesionals and involve them in working with nondisabled students as well as students with disabilities.

5.8 **Practice:** Instructional staff implement positive behavior management strategies that utilize natural cues/corrections with support from related services personnel and other team members.

Strategies:

Develop and implement a comprehensive inservice plan with the parents of students with disabilities and school site personnel to address positive behavioral support strategies.

Use a mentor or lead teachers to conduct inservices and set up peer coaching systems to maintain and reinforce positive behavior management skills.

5.9 **Practice:** Instructional staff demonstrate positive attitudes toward all students.

Strategies:

Develop and implement a comprehensive inservice plan with parents and school site personnel to address disability awareness and teacher modeling.

Ensure that students are included in all activities (i.e., taking yearbook and class pictures, graduation, orientations, class trips).

STUDENT INCLUSION

Part 6. Student Activities

6.1 **Practice:** Students have access to all school environments for instruction and interactions.

Strategies:

Use heterogeneous grouping strategies.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Enlist student participation in instructional and school planning teams.

Utilize natural supports to facilitate social interaction.

Utilize the Student Council in developing peer support.

Enlist support from peers in the general education classroom.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Develop a peer and/or family support system to enable all students to participate.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

6.2 **Practice:** Students participate in and are included in all activities, such as:

- music
- art
- library
- gym
- lunch
- assemblies
- clubs
- general education classes
- home economics
- work experience
- recess/break
- computer use
- graduation exercises
- field trips

Strategies:

Ensure that all students are included in the master scheduling process.

Develop a peer and/or family support system to enable all students to participate.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Examine the role of the paraprofessionals and involve them in working with nondisabled students as well as students with disabilities.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

Use heterogeneous grouping strategies.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Enlist support from peers in the general education classroom.

Enlist student participation in instructional and school planning teams.

Utilize the Student Council in developing peer support.

6.3 **Practice:** Students with disabilities are involved in extracurricular school activities such as:

- clubs
- dances
- after school recreation/day care programs
- scouts

Strategies:

Develop a peer support system and/or family support system to enable all students to participate.

Enlist student participation in instructional and school planning teams.

Enlist support from peers in the general education classroom.

Use other support staff (i.e., speech therapists, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Utilize the Student Council to develop peer support.

Work with school site teams to review existing clubs and opportunities for peer support in facilitating participation.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to support students in inclusive environments.

Part 7. Interaction with Peers

7.1 **Practice:** Students' instructional programs incorporate interaction with nondisabled students as appropriate in the following areas:

- General Education/Academic
- Communication/Socialization
- Personal Management (includes Self Determination)
- Home/Domestic
- Transition/Vocational
- Recreation/Leisure

Strategies:

Obtain/develop technical assistance on cooperative learning, adapting curriculum, use of natural supports, and facilitating social relationships.

Develop school site practices which facilitate peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

Develop a peer support system and/or family support system to enable all students to participate.

Enlist student participation in instructional and school planning teams.

Enlist support from peers in the general education classroom.

7.2 **Practice:** Students are involved with age-appropriate, nondisabled peers is structured interaction programs such as:

- Peer tutoring in school and community environments
- "PALS" (Partners at Lunch) or lunch buddies
- Circle of Friends
- Co-worker support at job training site
- MAPS

Strategies:

Obtain/develop technical assistance on cooperative learning, adapting curriculum, use of natural supports, and facilitating social relationships.

Put in place mechanisms and procedures for creating structured interaction programs (e.g., peer tutoring, circles of friends) involving general education students (site-based work experience, service credits, elective courses where appropriate).

Implement school site practices which promote the development of peer relationships (e.g., inclusion in activities across environments, teacher responsibilities within the school, transportation schedule and coordinated school hours, etc.).

Utilize instructional and related services staff (i.e., therapists, paraprofessionals, etc.) to provide instruction/therapy in general education and community environments.

Utilize natural supports to facilitate social interaction.

Use adaptations of MAPS and Circle of Friends for all students.

Develop a plan for recruiting general education peers to facilitate peer tutoring or friends programs.

7.3 **Practice:** Social interaction programs are:

- Well organized
- Positive in orientation (emphasizing students' strengths, focusing on functional activities)
- Well attended
- Supported by principal, faculty, and parents
- Viewed as a positive experience by students

Stategies:

Develop and implement a comprehensive inservice plan with parents and school site personnel which addresses social relationships.

Provide parents opportunities to visit model inclusive sites that have social interaction programs in operation.

Provide information about social interaction programs in newsletters to all parents.

Involve PTA in planning social interaction programs.

Involve parents in planning social interaction programs/activities at the site (e.g., via instructional planning teams, school site councils, site level inclusion task forces, etc.).

Evaluate outcomes of social interaction programs on an ongoing basis through student planning teams.

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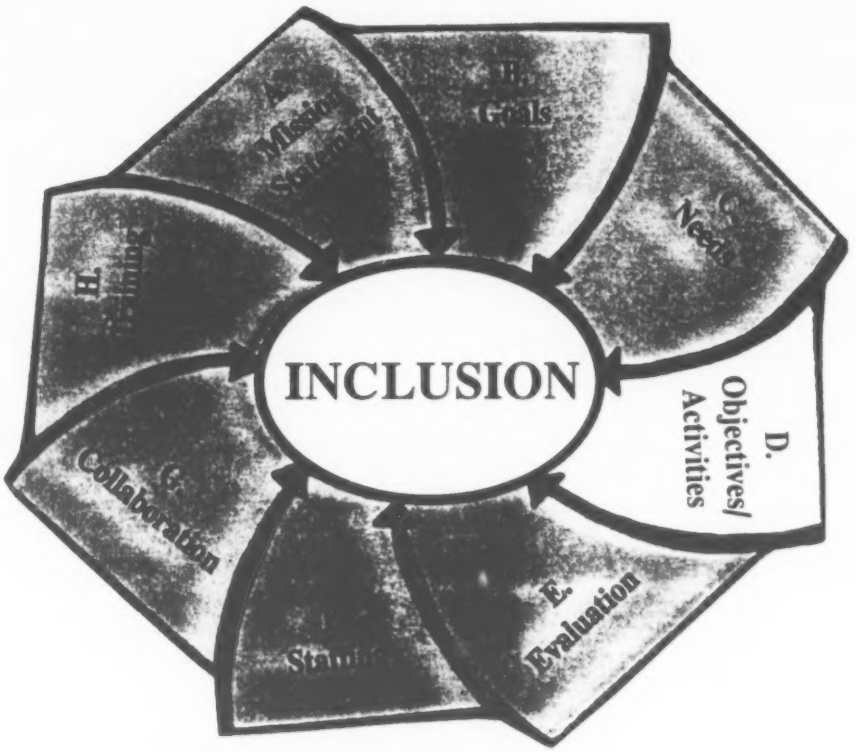
1. The majority of the effective practice items contained in this checklist have been adapted from: Halvorsen, A., Smithey, L., & Neary, T. (1992). Implementation site criteria for inclusive programs. Sacramento, CA: California State Department of Education, PEERS Project.

2. These effective practice items have been taken or adapted from: Meyer, L. H., Eichinger, J., & Park-Lee, S. (1987). A validation of program quality indicators in educational services for students with severe disabilities. The Journal of The Association for Persons with Severe Handicaps, 12(4), pages 251-263.

3. These effective practice items have been taken or adapted from: Freagon, S., Keiser, N., Kincaid, M., Usilton, R., & Smith, A. (1992). Individual school district profile for planning and implementing the inclusion of students with disabilities in general education and their transition to adult living and continuing education. Springfield, IL: Illinois State Board of Education, Project CHOICES/Early CHOICES, S.A.S.E.D.



D . OBJECTIVES/ ACTIVITIES

After the mission statement and goals have been completed, the action plan comprised of objectives and activities is developed. Objectives are concise, measurable statements of what the school staff expects to achieve as a result of faculty senate planning. Activities describe the actions to be taken to achieve the objectives.

SECTION D. OBJECTIVES AND ACTIVITIES

DEFINITION

Objectives are concise, measurable statements of what the school staff expects to achieve as a result of faculty senate planning. They are the intermediate steps to achieving the goals previously established. Objectives use words that are observable; words describing things that can be seen, heard, measured or counted. The activities, or strategies, specify what will be done to achieve the objectives, who will be responsible for the action and when it will be completed.

CONCEPTS

Just as the goals must be directly linked to the identified needs, objectives are developed to make progress toward accomplishing each goal. The activities must then be designed to achieve one or more of the stated objectives. The strategic planning process involves both short and long range planning for general and special education. That is to say, some objectives can be easily addressed by simple changes in a process, product, or personnel. However, others may require several sequential activities to successfully meet the objective.

Goals provide direction for the objectives and activities. Therefore, objectives and activities are written for each goal that appears on the strategic plan. The number of objectives and activities may vary based on the needs of the school and community. Objectives and activities also relate directly to the needs assessment information. For example, a goal may be written in general terms, such as "improve practices that enhance inclusion". If so, the objectives and activities must be more specific and include tasks identified as areas of need in the needs assessment. The objectives and activities might specify that the school will establish collaborative teams, learning strategies, integrated curriculum or peer tutoring. The faculty senate must determine the level of specificity of the objectives and activities necessary to accomplish the goals. Examples of objectives and activities are given on page D-3.

DEVELOPMENT AND IMPLEMENTATION

Now that the vision for the strategic plan has been developed, needs have been assessed, and goals have been established, it is time to develop an **action plan** comprised of objectives and activities, including timelines, for meeting those objectives.

When developing a building-level action plan these general guidelines are recommended:

- Involve stakeholders in the development/selection of objectives and activities.
- Use the mission statement to guide decisions regarding the selection of objectives and activities.
- Base the objectives and activities upon the needs assessment and the environmental scan, including information from surveys, questionnaires, observation and program evaluations. If the Effective Practice Checklist-Building Level (pages C-6 through C-11) has been utilized, the Effective Building Level Practices and Supportive Strategies (pages C-12 through C-31) can be used to develop the objectives and activities for the strategic plan. The practices related to specific needs assessment items can be selected or modified to become objectives in that goal area. The strategies can be reviewed, modified, if necessary, and selected as activities to be undertaken to achieve the corresponding objectives.
- Create an action plan chart which includes goals, objectives, activities/strategies, resources needed, persons responsible, timelines and evaluation methods.

The development of an action plan takes a great deal of time, resources and support that are not always available in sufficient quantities. To facilitate the process, a form is included on page D-4 that may be used and/or adapted for this purpose.

Students who will be included in the regular classroom may need a variety of supports. When developing an action plan, it is important to consider the methods of adaptation or support necessary for student success in the classroom such as:

classroom access	specialized equipment	adapted instruction
modified materials	assistive technology	behavior modification
timed work	test taking	multisensory teaching
attention span	attitude	unsupervised activity
self-esteem	medication	peer assistance
agency support	toileting	transportation
social skills	home communication	physical restraint

The methods needed by the students at each school will influence what activities must be undertaken by the school's staff and, subsequently, be included in the school's strategic plan. Additionally, W. V. Code §18-5A-5 requires the strategic plan to address staffing, collaboration and training needs. These areas should, therefore, be addressed in the form of objectives and activities to be achieved.

TOOLS

SAMPLE OBJECTIVES AND ACTIVITIES

Objective: *Special education and general education teachers will meet several times each month for collaborative planning.*

Activities:

1) *Large group activities will be scheduled bi-weekly to allow teachers to meet in collaborative teams.*
2) *Use integrated curricular activities to release teachers on a rotational basis for collaborative planning..*

Objective: *School personnel will regularly use a variety of teaching strategies that will benefit all students.*

Activities:

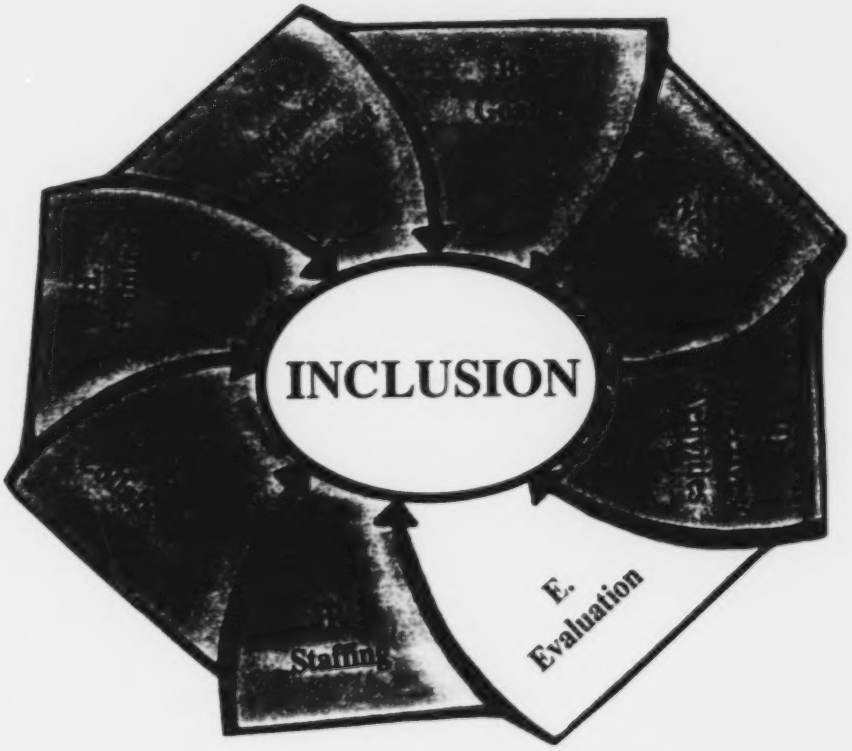
1) *School personnel will participate in training on the following teaching strategies: (those identified by needs assessment/environmental scan/ surveys)*
2) *Trained personnel will act as "in-class" mentors to facilitate the use of the teaching strategies.*
3) *School personnel will meet periodically to discuss the effectiveness of the new teaching strategies.*

STRATEGIC PLANNING WORKSHEET

GOAL:_____

Objectives	Activities	Timeline	Person Responsible	Evaluation

D4 of 4



E . EVALUATION

The purpose of evaluation is to determine whether the change is occurring, whether the change represents progress and what actions are needed.

(Villa, Thousand, W. Stainback, and B. Stainback, 1993)

SECTION E. EVALUATION

DEFINITION

Evaluation is the key element of strategic planning that measures the success toward achieving the mission, goals, objectives and activities. The information obtained through evaluation can also be used to guide future planning. "The purpose of evaluation is to determine whether the change is occurring and whether the change represents progress. Another is to determine the actions that need to be taken into consideration in the future which address the successes and the failures and whether the change represents progress" (Villa, et al., 1993).

CONCEPTS

Evaluation should be an on-going activity throughout all phases of the planning and implementation process, even when no progress is thought to be underway. "A key role of evaluation is to facilitate a change in culture by signaling to everyone what is and what will continue to be valued, respected, and expected in the future" (Villa, et al., 1993). In other words, people know what is expected and considered important by what is evaluated.

To maximize the effectiveness of the evaluation process, it is vital to involve everyone, including students, as evaluators. Furthermore, the questions to be answered should include those of the individuals involved in the planning process as well as those affected by the change(s). For example, parents, students, school administrators, community members and support personnel may be involved in the evaluation process. The perspective provided by these individuals allows the comparison of the anticipated outcomes versus the actual results.

DEVELOPMENT AND IMPLEMENTATION

A well-defined and organized evaluation system is the best way to appropriately address the challenges identified in the strategic planning process. In order to conduct a comprehensive evaluation of the plan's anticipated effectiveness, the goals and objectives must be clearly articulated from the beginning. The goals, objectives, activities and accomplishments can be evaluated either during the course (formative) of the implementation phase or at the conclusion (summative) of the implementation of the plan. The fundamental reasons to evaluate include: (1) to identify needed changes in the plan (Process Evaluation); (2) to provide data (Outcome Evaluation); and (3) to illustrate effectiveness (Impact Evaluation).

Full explanations of these three types of evaluation with sample evaluation questions are found on pages E-3 and E-4.

The following are four key steps of a comprehensive approach to evaluating the strategic planning process.

1. Develop an Evaluation Plan

   A well-defined, structured approach must be in place when evaluating the development and implementation of the strategic plan. An evaluation plan should be specific, easily understandable, encourage staff participation and reflect the desired outcomes of the process.

   The faculty senate must identify and prioritize the areas to be evaluated. These areas will serve as a guide when developing evaluation questions. Areas may include collaborative teamwork, IEP development, professional practices, school mission and philosophy, and other areas identifed as priorities, such as student achievement.

2. Develop Evaluation Questions

   This stage of the process focuses on the specific information of what is going to be analyzed. These questions represent the information the planning team feels is important to demonstrate progress, make modifications and guide future planning. The questions should be broad in scope and address building priorities. If the Effective Practice Checklist-Building Level (pages C-6 through C-11) was utilized in developing the strategic plan, the selected practices (objectives) can be reworded to formulate the evaluation questions.

3. Utilize a Format

   This stage requires a system to document the evaluation process. The method selected will guide the faculty senate's efforts. This process commences with listing the evaluation questions and ends with the recommendations. Refer to page E-5 for a sample format.

4. Develop a Final Report

   The evaluation of the process can be conducted at any point during the implementation of the plan or at the conclusion. While there is no specific format, the report should reflect the needs of the school. The final report is written to demonstrate progress in achievement of the goals and objectives and to obtain support from the administration and community for future activities. The results of the evaluation and recommendations based upon the results become a major component of the needs assessment for the annual review and revision of the stategic plan.

TOOLS

Process Evaluation

The primary focus of process evaluation is to maintain a check on whether the plan is meeting the identified priority needs or whether changes in the plan need to be made. Critical evaluation questions include:

- Who participated in the change process? Were all key constituencies, or stakeholders, represented at the district and/or building levels?
- Does the plan have specific objectives, timelines and evaluation criteria for the implementation change?
- Have the activities been carried out as planned?
- Have timelines been met?
- Have the numbers and types of individuals projected to be affected really been reached?
- Have the activities undertaken been consistent with the overall goals of the effort?
- What has worked well and what have been the keys to success?
- Have any barriers been encountered? If so, how were they overcome?
- Were revisions made to original plans? If so, why?
- How has the strategic planning process for the inclusion of students with exceptional needs been infused within the overall restructuring of services provided to all children?

Outcome Evaluation

Another type of evaluation identifies whether or not the desired outcomes have been reached as stated in the goals and objectives. Sample questions to evaluate the outcomes of the activities focus on the following:

- Have the goals and objectives of the project been reached?
- What has happened as a result of meeting these objectives?
- How many people have been affected?
- Have any district activities influenced the achievement of the goals identified in the plan?
- Have any products been developed as a result of this plan?

Impact Evaluation

The effectiveness of any plan is measured by the long term impact of the activities described in the plan. The following questions should be addressed when determining the impact:

- Have the accomplishments of the project activities resulted in any long term effects? If so, specify.
- Are the best practice indicators (refer to Section C, Needs) for inclusive programs in place?
- If follow-up data are available, do they reflect the desired long term changes?
- Have any school and/or district policies been changed or modified? If so, specify.
- Have follow-up visits or observations demonstrated positive outcomes?

(Karas, T & Alwell, 1992)

School:_____Projected Completion Date: _____

SCHOOL-BASED EVALUATION MANAGEMENT PLAN

Evaluation Question	Area(s) to be Evaluated	Data Collection Activities	Persons Responsible	Timelines	Results	Comments/ Barriers	Recommendations

F . STAFFING

The school staff, through the appropriate use of personnel, makes a commitment to serve all students. The school environment enriches the total team's ability to maximize student learning through quality staff development.

SECTION F. IDENTIFICATION/ALLOCATION OF STAFF

DEFINITION

The school, through the appropriate use of building staff, makes the commitment to provide a quality education for all students. This may include: the reassignment of existing resources within a school to meet the needs of all students; the review of assignments and schedules of personnel to improve the delivery of services to all students; the revision of staff job descriptions to incorporate inclusion responsibilities; the realignment of paraprofessional staff; the reorganization of related service personnel schedules to allow for the provision of service in natural settings; the scheduling of all staff members to perform school related duties; and when additional services are needed that cannot be met by existing staff, the hiring of competent individuals who have demonstrated knowledge and skills in educating students with exceptional needs.

CONCEPTS

Classroom organization and other learning environments must be more dynamic, active and collaborative to provide all students with quality instructional services and to provide exceptional needs students with appropriate support services. Educational programming can occur throughout the entire school community with the regular education classroom being just one of the options for students with exceptional needs. When planning instruction for exceptional needs students, it is important to consider that the needs of some students, such as those with challenging behaviors or community-based instructional needs, can be addressed in a broad range of learning environments. The resources needed for students receiving services in alternative learning environments must also be considered in the development of the strategic plan.

To address staffing in the development of the strategic plan, the faculty senate must examine both student grouping patterns and staffing patterns with the intent of enhancing the staff's ability to provide the best learning opportunities for all students. Once these patterns have been examined, current scheduling practices must also be examined. While it may appear to be best administratively to cluster groups of students with exceptional needs in particular classes, scheduling considerations must be compatible with the classroom organization and curriculum design.

Traditionally, scheduling has been done by the principal or his/her designee. In some schools today, a scheduling committee or team of teachers make the decisions regarding the scheduling of students and personnel for instructional purposes. Teacher input is an essential component to making appropriate successful scheduling decisions.

DEVELOPMENT AND IMPLEMENTATION

As a part of the needs assessment process, the faculty senate must look at the total student population (such as students with exceptionalities and at-risk students) and how they are distributed across ages and grade levels to begin the task of examining student grouping patterns. The decisions regarding placement of students within the school environment will influence the scheduling of needed supports and services. Therefore, the analysis of the student population and the evaluation of current staffing patterns is necessary to identify what resources need to be acquired or reallocated. This is a very critical step and can lead to frustrating results if not thoroughly analyzed.

The following questions need to be discussed and answered by the faculty senate as a part of the internal environmental scan component of the needs assessment. In addition, the forms on pages F-7 and F-8 can be utilized to facilitate the faculty senate's examination of student grouping patterns, and the identification and allocation of staff.

Student Population

1. What is the student population for the school attendance area?
   a. What grade levels?
   b. Are there students living in the attendance area that attend a different school?

2. Among the students receiving special educational services:
   a. What are their labeled exceptionalities?
   b. What are the specific educational difficulties and abilities?
   c. What is the severity of each exceptionality?

3. How are students grouped/distributed among classrooms? These are some issues to work into the planning process:
   a. Age-Appropriateness. Many schools use a general rule of thumb for classroom placement of plus or minus two chronological years.
   b. Physical Setting. Size of classroom and physical layout are among the issues to address when considering the placement of students that require adequate space for mobility, such as students in wheelchairs or with sensory impairments.
   c. Support Personnel. Are support personnel, such as paraprofessionals, being utilized effectively to support students?

4. How/where do students with special concerns or considerations receive support?
   a. Challenging behavior problems
   b. Intensive medical/health issues
   c. Social integration (cooperative base groups, advisory groups, circles of friends, etc.)
   d. Other

5. If a special education classroom is no longer needed, what are some viable options for its effective utilization?

Current Staff

1. What personnel resources are currently available?
   a. Paraprofessionals (e.g. classroom aides or sign language specialist)
   b. Teachers
      - Special Education
      - General Education
      - Vocational Education
   c. Teacher Consultant(s)
   d. Itinerant Staff
      - Occupational Therapist
      - Speech Therapist
      - Physical Therapist
      - Other
   e. Chapter I (Teachers and aides)
   f. All other support (volunteers, etc.)

2. How can staff be used effectively to support all students?
   a. Are staff duplicating services by overlapping schedules or caseloads?
   b. Are the support services being provided in the classroom (co-teaching, classroom-based therapies, etc.) providing a benefit for the entire class and teacher?
   c. What would integrated delivery of educational and related services look like?
   d. For secondary schools, could special education and other support personnel be better utilized in a grade level/unit approach or content area/department-based approach in which they are an integral member of the planning and teaching team?

3. Are there regulations or policies (e.g., certification) limiting the responsibilities of listed staff?

4. Have staff roles and responsibilities been discussed, understood, and acknowledged?

5. How could the day be organized to allow for optimal team collaboration?

Based upon the examination and identification of student grouping and staffing patterns in the school, the faculty senate must next review the existing schedule to determine its effectiveness in supporting the integration of students with exceptional needs into the regular classroom. Because teacher input is essential to successful scheduling, the faculty senate should "brainstorm" scheduling strategies that would meet the needs of the student population given the personnel and other resources available to the school.

Suggested scheduling strategies include, but are not limited to:

- Schedule special educators in regular classrooms on a rotating basis.
- Schedule the special educators to provide for enrichment or reteach activities, teach the entire class, team teach units for courses, deliver extended academics and/or work with individual or small groups of students.
- Utilize compact or block scheduling.
- Schedule two consecutive planning periods to provide additional planning time for collaboration.
- Schedule common planning time for special and regular education teachers to collaborate.
- Schedule time for teachers to informally meet to discuss instructional strategies to be used. This may occur before or after school or during the school day.

For additional scheduling considerations refer to page F-6. Also, specific strategies for scheduling collaborative planning time are listed on page G-10.

The legislation specifies that the faculty senate's strategic plan will include "guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional students without diminishing the services rendered to the other students in integrated classrooms." These guidelines or objectives could include assuring that the supplementary services and aids, including special education personnel, are provided in the regular classroom to meet the needs of the exceptional students as specified on their IEPs. This is required by both federal and state board of education policy, and now by state legislation.

There are many different approaches to successfully meeting the needs of exceptional students in the regular classroom without diminishing the services rendered to the other students in the integrated classroom. Some of these approaches are described in the section on collaboration and must be considered as the faculty senate/stakeholders discuss staffing and staff development.

TOOLS

STUDENT CONSIDERATIONS

Individualized Education Program

Review of Individualized Education Programs (IEPs) will identify staff necessary to meet the needs of students with exceptionalities. All the required special education services, related services, transition services, and supplementary services and aids a student needs must be described, or documented, on the IEP before the IEP Committee determines the student's placement. Staffing needs will be determined, to a large extent, by the special education services identified in the student's IEP. The following are some examples of how services can be described on an IEP: consultation to regular education teacher; instructional services in the regular classroom; occupational therapist (OT) consultation; or, physical therapy (PT) requiring removal from regular classroom.

STAFFING CONSIDERATIONS

Has there been discussion about:

- Scheduling of cooperative teaching efforts (frequency/duration)
- Teaching roles and responsibilities
- Classroom organization and overall management
- Classroom rules, procedures and discipline techniques
- Communication with parents and students
- Grading papers, homework, etc.
- Acquiring materials and equipment
- On-going planning of cooperative teaching
- Monitoring of the program (frequency, duration, location)
- Grading of students' work, overall performance
- Curricular focus (critical knowledge and skill)
- Scope and sequence of instruction
- Pacing of instruction
- Instructional delivery approaches

SCHEDULING CONSIDERATIONS

The following activities are possible options for consideration during the faculty senate's discussion regarding scheduling. These are not prioritized, sequential, or required.

Identify all students with exceptional needs.

Identify special education personnel available.

Review the student's Individualized Education Programs (IEPs).

Analyze how special education students are distributed across ages/grades.

Identify regular classrooms that special education students attend or would attend, if not disabled.

Identify the regular classrooms per grade/subject area for potential assignment of special education students, if more than one classroom per grade/subject area exists.

Discuss student information, such as academic, behavioral, material/equipment and health needs.

Identify the courses students who are earning a standard diploma need for graduation.

Identify all other personnel providing supportive services to the students.

Identify collaborative models for serving special education students in the regular classrooms.

Discuss how special education and other support staff can best serve the students.

Schedule students with disabilities in regular education classes before regular education students to group students for efficient use of special education and other support staff. (In inclusive classrooms, a majority or more of the students are nondisabled.)

Schedule special education and other support staff with regular education teachers.

Establish regular meeting/planning times.

Monitor, document, and evaluate continually, and adjust as needed.

IDENTIFICATION AND ALLOCATION OF RESOURCES
ELEMENTARY

CURRENT STAFF/ROLES

1. What Personnel Resources are currently available?
   - Paraprofessional(s)
   - Teachers(s)
     a. Special Education
     b. General Education
   - Teacher Consultant
   - Itinerant Staff
     a. Occupational Therapist
     b. Physical Therapist
     c. Speech Pathologist
   - Chapter I

2. How can staff be used effectively to support all students? (i.e. Co-teaching, Classroom-based therapy, etc.)

3. Are there regulations/policies limiting responsibilities of listed staff?

4. How do we schedule teams to plan collaboratively?

STUDENT POPULATION

1. Who are students in attendance area?
   - What grade level

2. What are their labeled exceptionalities?
   - Specific Difficulties/Abilities
   - Severity of learning problems

3. How do we distribute/group students among classrooms?
   - Age-Appropriate
   - Physical setting issues (i.e. class size, layout)
   - Effective use of support personnel

4. How/where do students with behavioral problems receive support?

5. How do we effectively utilize the special education rooms?

PHYSICAL SETTING

K	*Classrooms used/ previously used as special education rooms.
1	1
2	2
3	3
4	4
5	5
6	6
*	0

IDENTIFICATION AND ALLOCATION OF RESOURCES

SECONDARY

CURRENT STAFF/ROLES

1. What Personnel Resources are currently available?
   - Paraprofessional(s)
   - Teacher(s)
     a. Special Education
     b. General Education
   - Teacher Consultant
   - Itinerant Staff
     a. Occupational Therapist
     b. Physical Therapist
     c. Speech Pathologist
   - Chapter I

2. How can staff be used effectively to support all students? (i.e., Co-teaching, Classroom-based therapy, etc.)

3. Are there regulations/policies limiting responsibilities of listed staff?

4. How do we schedule teams to plan collaboratively?

STUDENT POPULATION

1. Who are students in attendance area?
   - What grade level

2. What are their labeled exceptionalities?
   - Specific Difficulties/Abilities
   - Severity of learning problems (i.e. high needs → low needs)

3. How do we distribute/group students among classrooms?
   - Age-Appropriate
   - Physical setting issues (i.e. class size, layout)
   - Effective use of support personnel

4. How/where do students with behavioral problems receive support?

5. How do we effectively utilize the special education rooms?

PHYSICAL SETTING

Decisions on Utilization of Special Education and Ancillary Support

1. Grade level unit approach

Math
Science
Social Studies
Language Arts
Special Education

2. Content/Area/Department-based Approach

Department	Regular Ed. Staff	Sp. Ed. Ancillary Staff	Student Demographics

G. COLLABORATION

Collaboration is a strategy, approach, program or model in which at least two co-equal parties voluntarily engage in shared decision making to achieve a valued common goal.(Griend and Cook, 1992)

SECTION G. COLLABORATION

DEFINITION

Collaboration is a strategy, approach, program or model in which at least two co-equal parties voluntarily engage in shared decision-making to achieve a valued common goal (Friend and Cook, 1992). In schools that are successfully integrating students with disabilities, personnel consistently identify collaborative teams and the collaborative decision-making and problem-solving processes as keystones of their success (Stainback & Stainback, 1990; Thousand & Villa, 1989, 1991). Collaboration or collaborative teaming is a problem-solving process through which individuals of the school community strive to clearly understand the needs of students and, in turn, specify appropriate actions to be taken. Collaborative teaming is an ongoing process whereby educators with different areas of expertise voluntarily work together to create solutions to problems that are impeding students' success, as well as to carefully monitor and refine those solutions (Knackendoffel, Robinson, Deshler, & Schumaker, 1994).

CONCEPTS

Successful schools are distinguishable from unsuccessful ones by the frequency and extent to which teachers practice, collaboratively design materials, and inform and critique one another. Collaboration appears necessary to continuing growth and improvement in the individual as well as to sustaining a good school (Raywid, 1993). Dynamic in nature, collaborative teams are meant to generate new information, new understandings, clarify issues and share problems and successes (Neary, Halvorsen, Kronberg & Kelly, 1992). Collaborative teaming joins together the key players in the lives of students- parents, teachers, principals, paraprofessionals, therapists and others-in a process that encourages cooperation, interdependence and support (Kelly, Ottlinger, Kohlhepp & Aune, 1991).

There are certain preliminary requirements for collaboration to occur: 1) the basic elements of effective **collaborative teams** must be in place; 2) **scheduling strategies** must create time for collaboration; and 3) **communication mechanisms** must facilitate and support collaborative endeavors. As a result of these collaborative endeavors, student needs and school community resources are identified, programming models are selected and instruction in integrated settings is planned and delivered. Through collaborative teaming, educators can meet the needs of an increasingly diverse student population.

More effectively meeting the needs of all students is the goal of teaming to collaboratively plan and deliver instructional services. More specifically, integrating students with exceptionalities into the regular classroom requires ongoing collaborative planning. The first stage of collaborative planning, the development of the Individualized Education Program (IEP), provides the framework and direction for the student's daily instruction.

The second stage of collaborative planning is the planning and delivery of daily instruction for those students with exceptionalities who receive instruction within the regular classroom. The planning process and delivery of instruction must be characterized by shared ownership among the regular and special education teachers. The degree of ownership for the delivery of specially designed instruction within the regular classroom will vary according to students' needs, classroom composition, collaborative model, and teachers' skills and attitudes.

DEVELOPMENT AND IMPLEMENTATION

1. Collaborative Teaming

Members of collaborative teams have two major tasks: to assist in maintaining positive working relationships within the team and to assist in achieving a common goal. These two tasks can only be accomplished in teams that demonstrate the following five basic elements of collaborative teaming:

a) Frequent face-to-face encounters.
Teams must meet frequently to develop collaborative relationships. If teams meet only when there are problems, proactive planning and the development of communication, trust and commitment to the groups' goals will not occur. Six to seven team members is an optimal size for a collaborative team.

b) A positive "one for all and all for one" sense of interdependence.
Three strategies that foster this Three Musketeers' attitude among members include:
1) having team members discuss individual and group goals,
2) distributing leadership functions among members, and
3) creating common rewards and responsibilities.

c) Interpersonal skills in leadership, communication, trust-building, decision-making, problem-solving and conflict management.
The most effective teams are those that use a consensual (i.e. all members must agree) rather than a democratic (i.e. the greatest number of votes wins) approach. To behave in a consensual fashion, however, requires the development of numerous social skills including trust, active listening, perspective-taking, questioning for deeper understanding, and giving and receiving feedback.

d) Periodic team processing.
Time should be allotted during team meetings to assess and discuss how well members are accomplishing the two tasks of collaborative teams: 1) achieving the task/goal and 2) maintaining positive relationships. Periodic processing of how well the group is functioning and how the group might improve is essential to group development.

e) Individual accountability.
Accountability for individual responsibilities within the team exists when members are aware that their contributions to the group effort are identifiable and necessary for group success. Accountability can be facilitated by keeping a public record of individual assignments through the written minutes of team meetings. Improvement in the interpersonal skills needed for effective collaborative teams requires intentional practice, evaluation and feedback (Kelly et al., 1991).

Additional information on the qualities, or characteristics, of superior and effective teams is found on pages G-8 and G-9.

2. Scheduling Strategies

Time for collaboration may be more important in change efforts than staff development, equipment or facilities. Time has emerged as the key issue in every analysis of school change appearing in the last decade (Raywid, 1993). Therefore, best practice indicates that time must be provided for collaborative teams (e.g. individual student planning teams, teacher assistance teams, teaching teams) to meet and monitor services, consult with one another, and to provide each other support and assistance (Fox & Williams, 1991).

The faculty senate should begin its discussion of scheduling collaborative planning time by considering the following:

Who will be involved (teachers, parents, students, others)?

When will planning occur (frequency, duration or as needed)?

How will planning be conducted (formal, informal, a combination)?

Where will planning occur (school or other place)?

Keeping a record of these discussions will insure that everyone involved understands their role in the scheduling arrangements.

A variety of scheduling strategies can be implemented to create time for collaboration. Each faculty senate should consider several of these strategies and select ones that are appropriate for its school when identifying objectives and activities for collaboration in the strategic plan. A list of strategies for increasing staff collaboration time is found on page G-10.

3. Communication Mechanisms

As previously stated, a basic element of collaborative teaming is frequent face-to-face interaction. To support and facilitate the communication process during these interactions and to avoid communication gaps and errors, other communication mechanisms must be established to:

a) ensure that a proposed plan has been effectively communicated;
b) make certain that the plan will be accurately implemented;
c) provide for follow-up regarding concerns/problems and feedback;
d) monitor and report student performance/progress; and
e) anticipate the unpredictable nature of communication needs (York, Doyle, Kronberg & Medwetz, 1993).

To facilitate communication and team productivity, worksheets, agendas or a combination of both can provide teams with a format that outlines members in attendance, members who are absent, agenda items, time alloted for each item, member roles, assigned tasks and persons responsible and agenda items for the next meeting.

Specific strategies for maintaining and fostering open communication among collaborative team members include:

a) record team meetings in a structured format
b) follow up with a meeting letter to all team members
c) assign a "peer buddy" who is responsible for contacting and reviewing the minutes of the meeting with each member who is absent
d) place an empty chair(s) at team meetings to represent absent member(s) as a reminder to consider their viewpoint
e) develop an action plan for tasks to be accomplished and persons responsible
f) develop a mini IEP that condenses information from a student's IEP into a summary
g) create an implementation form for delineating roles and responsibilities for implementing assigned task or activities
h) create a change of plans form to inform special education teachers of unexpected regular classroom changes
i) identify a centrally located bulletin board that all team members check daily for messages
j) utilize student progress reporting forms
k) utilize behavior management and crisis intervention plans

Additional information on strategies, or mechanisms, for effective communication are described on pages G-11 and G-12.

4. Selection of Collaborative Models

No single collaborative strategy, approach, program or model can be used by all schools to establish integrated educational opportunities for students with diverse needs. There is a kaleidescope of varying educational programs that facilitate and support the integration of students with disabilities into regular settings. Information about available programs and an awareness of the school's own needs are required when developing or selecting a program or model (Alberg, 1993).

Alberg (1993) provides a framework for organizing and classifying educational programs into manageable groupings so that the selection of collaborative models is simplified.

a. Conduct a needs assessment and develop a contextual profile of the school.

A needs assessment should have been conducted in accordance with Section C of this guide. Information from that needs assessment can be used by collaborative teams to determine the instructional needs of students, what approaches are being used and what results are expected.

b. Gather the following information about available collaborative models:

- target student population,
- focus of intervention,
- intended student competencies or school organizational outcomes,
- instructional content,
- resources needed for implementation, and
- evaluation of program implementation results.

A list, which is **not** exhaustive, and descriptions of several available educational collaborative models can be located on pages G-13 through G-19.

c. Organize and classify collaboration models into manageable groupings.

Develop a framework, such as the Decision-Making Matrix (pages G-21 through G-23) or the Framework for Classifying Educational Models (page G-20), that permits models to be classified according to their approaches to intervention and described according to general characteristics of each model (Research Triangle Institute, 1993; LeRoy, England & Osbeck, 1991). The approaches to intervention should include the instructional (i.e., curriculum and instructional delivery) and/or the administrative approach (i.e., classroom restructuring, school/district restructuring). General model descriptions should include characteristics of the target population, focus of the model's intervention, implementation requirements and evidence of effectiveness.

d. Determine appropriate models to be used in your school.

A sample of how to use the decision-making matrix is illustrated on pages G-24 through G-26. The models that meet the identified needs of students and are compatible with the curriculum resources and organization of the school should be given priority consideration.

5. Implementation of Collaborative Models

Prior to developing an IEP for a student, the MacGill Action Planning System (MAPS) helps to build an understanding of who the individual is from the perspective of those who know the student best. MAPS is a supporting collaborative planning strategy that develops a sense of community around one individual to use as a base for determining what the individual's needs are and how they can be met (Neary et al., 1992).

For students whose curriculum addresses a different set of goals and objectives than those of the core curriculum, instructional planning must address how these students can use regular classroom activities to master their individual goals (LeRoy, et al., 1991). The curriculum matrix, the activities matrix and the daily schedule are approaches that accommodate for the mastery of different skills within the regular classroom setting by establishing an interface between the regular class, curriculum and the special education student's curriculum (LeRoy, et al., 1991; Fox & Williams, 1991).

For students whose curriculum is not significantly different, accommodations within the regular curriculum can be accomplished by presenting the content in different formats, streamlining the content, streamlining the sequence of content (LeRoy, et al., 1991), adjusting performance standards, altering response requirements (e.g., oral instead of written answers) and/or using compensatory strategies (e.g., study guides, tape recorders). Many of these accommodations will be identified during the development of the IEP, however, more specific planning for individual units or lessons will also need to occur. Planning for instruction in the regular classroom for students with disabilities requires face-to-face interaction; separately designing lesson components will only result in duplications, omissions and decreased efficiency in lesson delivery.

Collaborative planning, also, necessitates the identification of problem situations that may arise (confusion with directions, refusal to complete work) and of detailed approaches to prevent the situation from occurring or to minimize disruption (Thousand, Villa, & Nevin, 1994). Specific issues, or considerations, that collaborative teams need to discuss and decide about include, but are not limited to:

- scheduling of cooperative teaching efforts (frequency and duration)
- teaching roles and responsibilities

- on-going planning of cooperative teaching
- classroom organization and overall management
- classroom rules, procedures and discipline techniques
- communicating with parents and students
- grading papers, homework, etc.
- acquiring materials and equipment
- monitoring of student progress
- pacing
- methods, i.e., instructional delivery approaches
- modifications
- identification of future goals and vocational and residential options within the community
- issues and trends in the surrounding environment that are likely to influence the quality of the person's life

Arriving at consensus-based decisions on the aforementioned issues as a part of collaborative planning is critical to the successful collaborative delivery of instructional services. For additional specific practices related to collaborative teaming and planning refer to pages C-20 through C-23 and G-27 through G-30.

TOOLS

The Qualities of Superior Work Teams*

Superior work teams differ from other work teams in four important respects:

First, superior work teams produce results based on the following:

- maximum use of the team's human resources;
- excellent performance against all odds; and
- continuous improvement of the team's "product" and process of working together.

Second, superior work teams make frequent and effective use of the following informal processes:

- communicating and contacting;
- responding and adapting;
- influencing and improving; and
- appreciating and celebrating.

Third, members of superior work teams have persistent positive feelings of:

- inclusion;
- commitment;
- loyalty;
- pride; and
- trust.

Fourth, the leadership of superior work teams is always oriented towards the team and teamwork, rather than towards individual performance. Leaders of superior teams perform the special roles of:

- initiator;
- model; and
- coach.

*Adapted from Superior work teams by Dennis C. Kinlaw, published in 1991 by Lexington Books, Lexington, MA.

TEN CHARACTERISTICS OF WELL-FUNCTIONING TEAMS

1. **PURPOSE** - Members proudly share a sense of why the team exists and are invested in accomplishing its mission.

2. **PRIORITIES** - Members know what needs to be done next, by whom, and by when to achieve team goals.

3. **ROLES** - Members know their roles in getting tasks done and when to allow a more skillful member to do a certain task.

4. **DECISIONS** - Authority and decision-making lines are clearly understood.

5. **CONFLICT** - Conflict is dealt with openly and is considered important to decision-making and personal growth.

6. **PERSONAL TRAITS** - Members feel their unique personalities are appreciated and well utilized.

7. **RISK** - Members are able to take risks and provide the needed support to each other.

8. **EFFECTIVENESS** - Members find team meetings efficient and productive and look forward to this time together.

9. **SUCCESS** - Members know clearly when the team has met with success and share in this equally and proudly.

10. **TRAINING** - Opportunities for feedback and updating skills are provided and taken advantage of by team members.

COLLABORATIVE SCHEDULING STRATEGIES

- Regularly bring large groups of students together for special types of experiences (e.g. films, guest speakers, plays).
- Use integrated curricular activities to release teachers on a rotational basis for collaborative planning.
- When students are doing independent projects, arrange for them to be clustered together in large groups (e.g., in library or multipurpose room).
- Hire a permanent "floating" substitute.
- Utilize cross-age peer tutors.
- Log time (teachers are compensated for time spent before and after school).
- Utilize volunteers (e.g., parents, grandparents, community/business leaders, retired teachers).
- Assign specific time(s) each day of week for collaboration only (written log required).
- Alter the school day for teachers, without students, on a regular basis.
- Set aside one day per grading period as "Collaboration Day" (no other activities can be substituted on this day).
- Extend by faculty vote the instructional day two days per week for 20 minutes to provide collaboration period for staff (days can be staggered, as well as time period each day of the week, to free staff at different times).
- Schedule sustained silent reading (students are clustered in large groups with paraprofessionals so teachers can be released).
- "Bank" time for collaboration.
- Utilize <u>all</u> staff for duties.

MECHANISMS FOR COMMUNICATION

I. Basic sources of misunderstanding which result in communication failures:

A. The listener is preoccupied and just does not listen to what others are saying.
B. The listener is more interested in talking than listening and listens only in an effort to find an opening to get the floor.
C. The listener may be so sure of what the other person is going to say that he or she distorts the statement to match expectations.
D. The listener is listening only to evaluate and make judgments about the speaker.
E. The listener sometimes does not fully understand the meaning of the words, not from lack of verbal ability, but from a lack of understanding of the situational factors.
F. The listener and/or speaker have a distrust of one another.
G. The language used becomes the barrier (offensive language, language reflecting a poor education, highly technical language, accented language, etc.).
H. The connotation of the words, that is, the same words having different meaning for the listener and the speaker, is not considered.

II. Methods of ensuring effective oral communication.

A. Organize your thoughts before speaking. Ascertain that the ideas you are presenting are related and relevant. Try to include only that information necessary to maximize the possibility of being fully understood.
B. Listen carefully to the persons with whom you are having the conversation. Make certain you are answering questions they are raising and that you are responding accurately to what is being said.
C. Communicate in your response that you have clearly heard and understood the sender by using feedback.
D. Avoid the tendency to give evaluative responses (e.g., "I think you're wrong, I agree entirely").
E. Pay attention to outside factors that may influence recipients' understanding of what you are saying or that may influence the meaning of what they are saying ("noise").

F. Remain flexible in your listening and responding. It is important to be aware of the likelihood of misperception or of selective understanding of the sender. The listener needs to be ready and willing to change his or her perception for the sake of effective communication.
G. Avoid using jargon.

III. Methods of ensuring effective written communication

A. Organize your thoughts before writing. Present only relevant information in your correspondence to ensure the complete attention of the recipient throughout the communication and to minimize misunderstanding of the intent.
B. Focus on brevity in written communications (e.g., use memos and outlines).
C. Avoid using jargon or abbreviations that could be misunderstood and cause the recipient to misinterpret the communication.
D. Choose words carefully. Much of oral communication is sent through inflections of the speaker's voice, a factor missing in written communication. Word the message to avoid misunderstanding of the intended meaning.
E. Write clearly. Hard-to-read written communication is easy to ignore, misread, or misunderstand.
F. Don't forget to sign your written communication or otherwise indicate the source of the message.
G. Ask for a response from the recipient.
H. Clearly indicate personal flexibility in your written message. Let the recipient know you are open to feedback, correction, change.

Adapted from, Johnson, D. W. (1972). Reaching out: Interpersonal effectiveness and self-actualization. Englewood Cliffs, NJ: Prentice-Hall.

COLLABORATIVE MODELS

This list is not exhaustive, but does include examples of collaborative models that are varied in their approaches and characteristics.

- High/Scope Curriculum
- Strategies Intervention Model
- Tactics for Thinking
- Direct Instruction
- Mastery Learning
- Learning Styles
- SUCCESS: Success Using Contingencies to Create Effective Social Skills
- Student Team Learning
- Classwide Student Tutoring Teams
- Adaptive Learning Environments Model
- Vermont Consulting Teacher Model
- North Carolina Lead Teacher Model
- Comprehensive Local School
- Coalition of Essential Schools
- Teacher Assistance Team
- Project RIDE: Responding to Individual Differences in Education
- Cooperative Teaching (Team Teaching)
- Peer Coaching
- Peer Support Teams

For More Information on collaborative models, Contact the Regional Education Service Agency (RESA) or the West Virginia Department of Education, Office of Special Education Programs and Assurances. (Refer to Resources Section for names, addresses and phone numbers.)

EDUCATIONAL COLLABORATIVE MODELS

- **High/Scope Curriculum**
  developed by David Weikart

  The High/Scope Curriculum is a cognitively oriented early childhood (preschool through grade 3) program that uses the concept that educational activities should be attuned to each child's level of development.

- **Strategies Intervention Model**
  developed by Don Deshler and Jan Schumaker

  The Strategies Intervention Model (SIM) curriculum is a series of specific intervention strategies used to teach students "how to learn". Designed for adolescents with learning disabilities, the curriculum includes strategies for students, specific instructional procedures for teachers, and the arrangement of a strategic environment in order to promote effective and efficient learning behavior.

- **Tactics for Thinking**
  developed by Robert J. Marzano and Daisy E. Arrendondo

  Tactics for Thinking is a systematic approach for teaching 22 general cognitive operations (or "thinking skills") that students can use in learning curriculum content and coping with their studies. Designed for general education students in K-12, the thinking skills are categorized into three distinct groups: learning-to-learn skills, content thinking skills, and reasoning skills.

- **Direct Instruction**
  developed by S. Englemann, W. C. Becker, and D. Carnine

  Direct Instruction (DI) is a comprehensive system of classroom organization, course content, and teaching techniques. DI is designed to:

  - Teach academic content, higher order thinking skills, and survival skills in a variety of subject areas (e.g., reading, language, and mathematics);
  - Enable students to learn more efficiently than with traditional methods of instruction;

- Elicit a high level of student participation;
- Ensure high rates of student success; and
- Increase students' self-concept, persistence, inquisitiveness, responsibility, and risk taking.

- **Mastery Learning**
  developed by Benjamin Bloom

Mastery Learning (ML) is a teacher-directed, whole-group, outcome-based instructional model that is designed to help teachers of students in grades K-12 teach more effectively and to help students learn more efficiently.

ML is integrated into the existing curriculum. ML teachers organize the curriculum into instructional units and develop an instructional plan for each unit. The plan includes unit and lesson objectives, prerequisites for learning the new content, materials and activities, time allocations, formative and mastery tests, and cut-off scores to determine mastery.

- **Learning Styles**
  developed by Rita Dunn

The Learning Styles Model (LSM) is an individualized instructional process that matches learning style preferences with instructional procedures and materials. The primary goal of LSM is to improve the effectiveness of instruction through the identification and matching of individual learning styles with appropriate instructional procedures and materials.

The LSM was developed for use in general education classrooms at the elementary and secondary levels.

- **SUCCESS: Success Using Contingencies to Create Effective Social Skills**
  developed by Hill M. Walker, Hyman Hops, and Charles R. Greenwood

SUCCESS consists of four separate packages or programs designed to assist teachers in managing four behavior disorders that are commonly encountered in grades K-3, and that contribute to school failure and developmental adjustment problems.

- **Student Team Learning**
  developed by Robert Slavin

  Student Team Learning (STL) consists of four whole-class instructional methods that engage students in cooperative learning to pursue common academic and social goals. These common goals are to motivate students to learn, enable the instruction of students with a wide range of skills and abilities within a single classroom, improve achievement in basic subject areas, and enhance social skills.

  STL was designed for students of all levels of academic achievement in grades 3-12, including those with mild to moderate disabilities.

- **Classwide Student Tutoring Teams**
  developed by Larry Maheady, Gregory F. Harper, Katherine Sacca, and Barbara Mallette

  Classwide Student Tutoring Teams (CSTT) is a cooperative learning model that uses peer tutoring and team competition to actively involve students in the learning process. CSTT was developed for students with a wide range of abilities, from elementary through high school levels, as an alternative classroom management technique to independent seatwork and traditional drill and practice activities.

- **Adaptive Learning Environments Model**
  developed by Margaret C. Wang

  The Adaptive Learning Environments Model (ALEM) is a comprehensive educational program for meeting the diverse social and academic needs of individual students of high, average, and low levels of academic achievement in grades K-12. The ALEM features (1) individualized progress plans, (2) a diagnostic-prescriptive monitoring system, (3) a student self-scheduling system that helps students take on increasing responsibility for their own behavior and learning progress, and (4) a support system that includes an adaptive program delivery system, a data-based staff development sequence, features that promote flexibility in school and classroom organizational patterns, and a systematic program for active family involvement.

- **Vermont Consulting Teacher Model**
  developed by H. McKenzie, A. Egner, M. (Fitzgerald) Knight, P. Perelman, B. Schneider, and J. Garvin

The Vermont Consulting Teacher model is a special education service delivery option. Through this model, a school-based consulting teacher collaborates with families, teachers, and other professionals to meet the needs of students with disabilities within the general education classroom.

- **North Carolina Lead Teacher Model**
  developed by the Public School Forum of North Carolina

The North Carolina (NC) Lead Teacher model is a restructuring approach that is designed to increase student performance by increasing the autonomy that teachers and local schools have in making decisions about nearly all aspects of instruction and the school environment. The team approach fosters an attitude of responsibility for all students in the school, including those with special learning needs.

- **Comprehensive Local School**
  developed by Wayne Sailor, Jacki Anderson, Ann Halvorsen, Kathy Doering, Jon Filler, and Lori Goetz

The Comprehensive Local School (CLS) is an organizational program that provides a structure for merging special and general education into a single system wherein students with disabilities from preschool through young adulthood are served in their neighborhood schools. A five-phased program, CLS incorporates two central concepts: heterogeneous groupings and the community at large as the primary educational environment.

- **Coalition of Essential Schools**
  developed by Ted Sizer

The Coalition of Essential Schools is a school restructuring enterprise that joins selected schools in a cooperative program designed to modify the priorities and simplify the structures of participating schools. Coalition schools are guided by nine common principles.

Originally designed to focus on secondary schools, the Coalition now includes elementary, middle/junior high, and senior high schools.

- **Teacher Assistance Teams**
  developed by Margaret Van Dusen Pysh and James Chalfant

  The Teacher Assistance Team (TAT) is a school-based problem-solving system where teachers assist each other in generating intervention strategies for any student or problematic situation. TATs typically are composed of three or four elected faculty members who meet weekly to provide problem solving assistance to anyone in the building.

  TATs can be implemented in elementary, middle/junior high, and senior high schools.

- **Project RIDE (Responding to Individual Differences in Education)**
  developed by Great Falls Public Schools, MT; Ray Beck, Project Director

  Project RIDE is a multi-faceted program designed to support the classroom teacher in accommodating at-risk learners in a learning environment that is as close to the regular classroom setting as possible. RIDE has three major components: (1) Effective Classroom Practices, (2) a computerized Tactics Bank and Video Library, and (3) School-Wide Assistance Teams.

- **Cooperative Teaching (Team Teaching)**
  Reference: Bauwens, Hourcade & Friend

  Cooperative Teaching is regular and special education teachers working together to jointly plan, teach and evaluate academically and behaviorally heterogeneous groups of students within the regular classroom. The purpose is to efficiently and effectively meet the needs of students with diverse abilities and skills within the regular classroom.

- **Peer Coaching**
  Reference: Glatthorn, Glasser & Brandt

  Peer Coaching is pairs or teams of teachers providing one another with feedback and observations regarding the instructional strategies that each teacher is learning and implementing. The relationship among the team members is a collegial and reciprocal one. The teachers are NOT supervising or evaluating one another; they are colleagues coaching one another.

- **Peer Support Teams**

  Reference: Thousand & Villa, Villa et al, Stainback &Stainback

  The focus of peer support teams is to enhance another student's school life. Peers may assist a student with physical disabilities in traveling to a class, problem solve in a small group to assist/help another student with a concern, help identify appropriate social integration goals at IEP meetings, or provide insight regarding the transition planning for a student with a disability. Peer support networks have helped to make heterogeneous schools places where students' learning is expanded to include an understanding of one another's lives.

Alberg, J. (1993). Educational approaches and program options for integrating students with disabilities. Longmont, CA: Sopris West

FRAMEWORK FOR CLASSIFYING EDUCATIONAL MODELS

Approach:	Instructional				Organizational (class, building, district)	
Focus:	Content		Method		Structure	Procedure
	Academic/ Skill Subject Matter	Strategy/ Process Subject Matter	Teacher Directed	Student Guided	Grade/Class Graduation	Professional Development
					Student-Assignment	Shared Decision-Making
	Direct Instruction (Becker, et. al,. 1981; Gersten, et. al., 1986; Becker, 1984; Gertsen, et.al., 1983)	Strategies Intervention Model (SIM) (Deschler, et.al., 1983; Deschler & Schumaker, 1986)	Contingencies for learning Academic and Social Skills (CLASS) (Walker, et.al., 1984)	Cooperative Learning (Johnson & Johnson, 1984)	Comprehensive Local Schools (CLS) (Sailor, et. al., 1989)	Behavioral Construction (Sheridan & Kratochwill, 1991)
	High/Scope Curriculum (Hohmann, et. al., 1978; Weikert, 1988)	Tactics for Thinking (Marzano & Arendondo, 1986)	Learning Styles Model (Dunn & Dunn, 1978)	Classwide Student Tutoring Teams (Maheady, et.al., 1980; Greenwood, et.al., 1988)	Michigan Inclusive Education Project (LeRoy, et.al., 1989)	Coalition of Essential School (O'Neil, 1990; Sizer, 1986; Sizer, 1989)

"Adapted from: Alberg **Cheshires**, (1991)

Michigan Inclusive Education Project

Figure 4. DECISION-MAKING MATRIX

	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery															
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided				Classroom Restructuring				School/District Restructuring			
(Insert program titles here→)																								
PROGRAM CHARACTERISTICS:																								
Target Population:																								
Grade Levels:																								
pre K																								
K-3																								
4-6																								
7-9																								
10-12																								
post 12																								
Types of Students:																								
Learning disabled																								
Mentally handicapped																								
Behaviorally/emotionally handicapped																								
Gifted																								
Other classified (e.g. Chapter 1, LEP)																								
General education																								
FOCUS OF INTERVENTION:																								
Classroom																								
Schoolwide																								
Districtwide																								
Intended Student Outcomes:																								
Academic competencies																								
Behavioral competence																								
Social competence																								

Figure 2. CONTINUED

	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery															
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided				Classroom Restructuring				School/District Restructuring			
(Insert program titles here→)																								
FOCUS OF INTERVENTION (continued)																								
Intended System Outcomes																								
Restructuring																								
Shared decision making																								
Teacher skill development																								
Reorganization																								
Instructional Content																								
Language arts																								
Mathematics																								
Other academic subjects																								
Study skills																								
Thinking skills																								
Behavior/social skills																								
IMPLEMENTATION REQUIREMENTS																								
Teacher manual/guide																								
Instructional materials																								
consumable																								
nonconsumable																								
Curriculum																								
replacement/addition																								
integrate with existing																								

Figure 2 CONTINUED

	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery															
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided				Classroom Restructuring				School/District Restructuring			
(Insert program titles here→)																								
Implementation Requirements (continued)																								
Staffing																								
Training																								
self																								
external																								
Facilities																								
additional																								
modify existing																								
EVIDENCE OF EFFECTIVENESS:																								
Evaluation Component(s) Included																								
Program effectiveness directly studied																								
Program methods/components have been studied																								

Figure 4. DECISION-MAKING MATRIX

SAMPLE

	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery								Classroom Restructuring				School/District Restructuring			
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided											
(Insert program titles here→)																								
PROGRAM CHARACTERISTICS																								
Target Population																								
Grade Levels																								
pre K	X									X								X	X	X		X		
K-3	X					X			X	X	X	X	X	X			X	X	X	X	X	X	X	
4-6						X			X	X	X		X	X			X	X	X	X	X	X	X	
7-9					X	X			X	X	X			X				X	X	X	X	X	X	
10-12					X	X			X	X	X			X				X	X	X	X	X	X	
post 12																								
Types of Students																								
Learning disabled														X									X	
Mentally handicapped														X									X	
Behaviorally/emotionally handicapped														X									X	
Gifted	X					X				X	X		X	X			X	X	X	X	X		X	
Other classified (e.g. Chapter 1, LEP)	X					X			X	X	X		X	X			X	X	X	X	X		X	
General education	X				X	X			X	X	X	X	X	X			X	X	X	X	X		X	
FOCUS OF INTERVENTION																								
Classroom	X				X	X			X	X	X	X	X	X			X	X	X	X				
Schoolwide																					X	X	X	
Districtwide																						X		
Intended Student Outcomes																								
Academic competencies	X				X	X			X	X	X		X	X			X	X	X	X		X	X	
Behavioral competence												X						X	X	X		X	X	

Social competence												X	X					X	X	X		X	X	

Figure 4. CONTINUED

SAMPLE	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery															
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided				Classroom Restructuring				School/District Restructuring			
(Insert program titles here→)																								
FOCUS OF INTERVENTION (continued)																								
Intended System Outcomes:																								
Restructuring																	X	X	X	X	X	X	X	
Shared decision making													X					X	X	X	X	X	X	
Teacher skill development																	X	X	X	X	X	X		
Reorganization													X				X					X		
Instructional Content:																								
Language arts	X								X	X	X		X	X			X	X	X	X				
Mathematics	X								X	X	X		X	X			X	X	X	X				
Other academic subjects	X								X	X	X		X	X			X	X	X	X				
Study skills					X	X												X	X	X				
Thinking skills	X				X	X												X	X	X				
Behavior/social skills												X	X				X	X	X	X				
IMPLEMENTATION REQIREMENTS:																								
Teacher manual/guide					X	X					X	X	X	X						X				
Instructional materials:																								
consumable									X		X		X											
nonconsumable						X						X	X											
Curriculum:																								
replacement/addition	X				X	X			X			X	X											
integrate with existing						X			X	X	X		X	X			X							

6-25 of 30

Figure 4. CONTINUED

SAMPLE	INSTRUCTIONAL APPROACH																ADMINISTRATIVE APPROACH							
	Curriculum								Instructional Delivery															
	Academic Skills				Strategies & Processes				Teacher Directed				Student Guided				Classroom Restructuring				School/District Restructuring			
(Insert program titles here→)																								
Implementation Requirements (continued)																								
Staffing									X			X					X	X			X	X	X	
Training																								
sekf												X		X							X	X	X	
external	X				X	X			X	X	X	X	X	X			X	X	X	X	X	X		
Facilities																								
additional																								
modify existing											X	X					X					X		
EVIDENCE OF EFFECTIVENESS																								
Evaluation Component(s) Included	X				X				X	X	X													
Program effectiveness directly studied	X				X				X			X	X					X		X				
Program methods/componentshave been studies					X	X				X	X		X	X			X	X	X	X	X	X	X	

Collaborative Planning

- The school provides opportunities for staff, students, family members and community members to become proficient at functioning in a collaborative manner (i.e., share responsibility and resources, make decisions by consensus, use a structured meeting agenda format, rotate team roles of facilitator, timekeeping and recorder).

- The school provides time during school hours for instructional support teams (e.g., individual student planning teams, teacher assistance teams, teaching teams) to meet and for individual team members to monitor services, and to provide timely consultation, support and technical assistance to families and staff.

- For students with intensive needs in basic skill and/or social skill areas or who are challenged by their gifts and talents, individual student planning teams are convened which are responsible for the development and implementation of all aspects of the student's educational program (e.g., student goals, student schedules, procedures to address learning/behavior/management issues, transition plans, strategies to support the student and his/her teachers and family).

- Individual student planning teams consist of the student, family members, the student's general class teacher(s) and other appropriate persons based upon the student's needs (e.g., principal, Chapter I teacher, music teacher, physical therapist, one or two of the student's peers, teaching assistant, special educator, social worker, representatives of community agencies, family advocates).

- The individual roles of each student planning team member, including related service providers and other consultants, are specified by the team and are supportive of the educational needs of the student.

Delivery of Instructional Support Services

- Instructional support services and staff (e.g., Chapter I, special education, speech and language, guidance, peer tutoring) are incorporated into ongoing school and community activities.

- The decision to pull any student out of on going school or community activities to receive support services is a team decision based upon documentation that the student's needs could not be achieved through the use of supplementary aids and services in the classroom. This decision is not based upon staff preferences.

- For students with needs (e.g., counseling, community-based training, medical) which cannot be met through ongoing activities, pull out is scheduled during activities which the team determines to be lowest priority for the student.

- The delivery of instructional support services (e.g. consultation, training, technical assistance, cooperative planning with support staff, team teaching with support staff, support staff delivering direct services in the classroom, release time for planning, access to instructional support teams) includes support to teachers, teaching assistants, volunteers, and other direct instructional staff.

Curriculum Planning

- The school's curricula are developed by teachers/staff, students, parents, administrators and community members and identify age-appropriate content (e.g., language arts, math, history, social/emotional, arts, health) and process oriented (problem-solving and collaboration skills, study skills) goals and objectives which promote meaningful participation in age-appropriate activities in home, recreational, educational, work and other aspects of community life, set a high standard of excellence and address the needs of all students.

- A variety of age-appropriate non-school instructional settings (e.g., daycare settings, the student's home, local stores and job sites) are available to students and matched to individual needs for learning new skills or for generalizing skills to new settings.

- The process for identifying curriculum content for an individual student with intensive needs in basic skill and/or social areas includes an analysis of the student's skills and interests and of the age-appropriate activities, skills and adaptations needed for the student to function in specific home, school, work, recreation and other community settings.

- Objectives for students with intensive needs in basic skill and/or social areas specify criteria which include performance in the student's home, school and other age-appropriate community settings.

- Students with intensive needs in basic skill/or social areas have paid work experiences in integrated community settings prior to leaving school.

- The system for monitoring the progress of students with intensive needs in basic skill and/or social areas includes: a) indications of level of independence on identified skills/activities; b) indications of environments in which those skills/activities have been demonstrated; c) an annual summary; and d) post school follow ups for purposes of program improvement.

Family/School Collaboration

- The school provides families with the freedom to visit the school and to communicate regularly with school staff on topics important to both the family and the school.

- There is information available to families which assists them to access informal support networks and connect with community resources (e.g., daycare programs, recreation programs, counseling, respite care, vocational rehabilitation, mental health).

- The school provides families with opportunities for consultation, training and follow-up from school staff to maximize their children's development in home and other community settings.

- Families are included in advisory, decision-making, and advocacy activities of the school (e.g., advisory committees, curriculum committees, development of the school philosophy and climate, school planning teams, staff development committees).

- Families are included in the decision-making process to determine the high priority educational needs of their children, and how and where (school, home, or community settings) their children will be taught.

- Instructional planning includes procedures for assisting families to incorporate instruction and/or practice of skills into ongoing home and community activities.

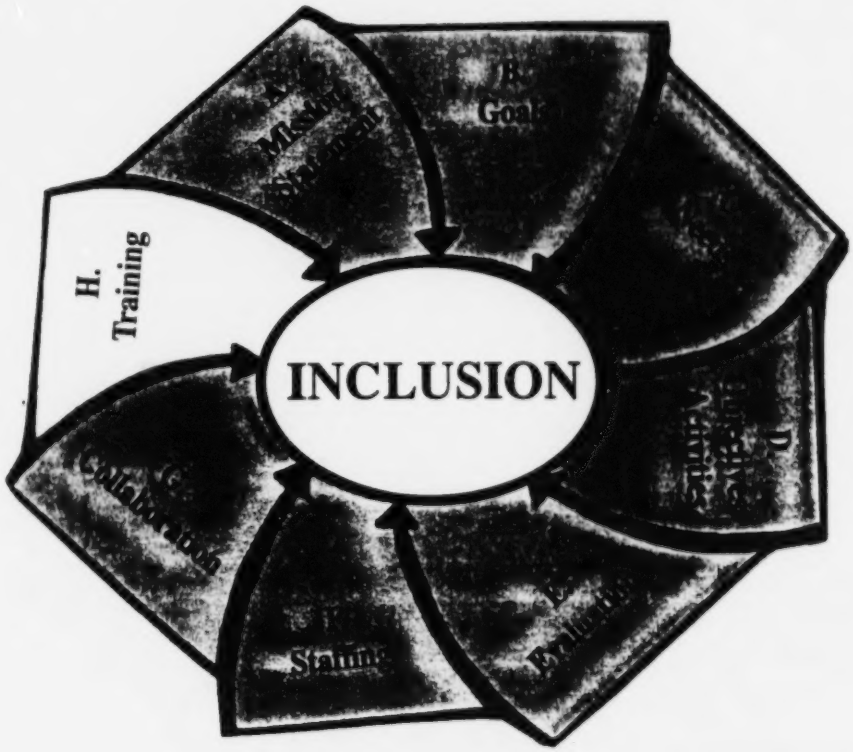
Transition Planning

- There should be procedures for facilitating the smooth transition of all students from one educational setting to another, and from school to post-school life.

- A written plan for transitioning each student with intensive needs, including students who are gifted, from one educational setting to another should be developed and implemented in advance of the move (e.g., 6 to 9 months).

- For high school aged students with intensive needs, a written graduation plan for transition to post-school life (e.g., employment, education, recreation, residential) should be developed and implemented well in advance of the transition (e.g., at age fourteen) and reviewed annually.

Fox, T.J. & Williams, W. (1991). Implementing best practices for all students in their local school. Burlington, VT: University of Vermont, Vermont Statewide Systems Support Project.



H . TRAINING

Staff development, or training, is any activity that is intended to prepare the staff for improved performance in present or future roles in the school system.

SECTION H. TRAINING

DEFINITION

Training, or staff development, is any district or school activity that is intended partly or primarily to prepare faculty and other staff members for improved performance in present or possible future roles in the school system. In broadening the definition, staff development includes any activity on the part of the individual, regardless of the school system's participation, that is intended to advance the individual's professional stature, performance on the job and professional growth. Professional development must focus on providing teachers, parents and support staff with the necessary skills and strategies for functioning as effective educators for all students.

CONCEPTS

One way to assure that the staff development needs of teachers, support personnel and parents are met appropriately and consistently is to develop a staff development plan. The design of a staff development plan follows steps similar to those of the strategic plan itself; basically, the identification of needs and the development of objectives and activities to address those needs. The following steps are recommended in the development of staff development plan:

Step 1. Determine Training Needs

The determination of staff development needs should be a component of the needs assessment process described in Section C. To discover areas in which staff need additional knowledge and skills, the faculty senate must:

a. define the student results which are expected;
b. identify staff skills which will be necessary to achieve the expected student results; and,
c. assess the current skills of the staff to determine what additional training is needed and how that information should be presented.

Step 2. Plan the Training

Design the training program, including methods of presentation, the identification of trainers, location and time of trainings and expected outcomes.

Step 3. Conduct the Training

Implement the various aspects of the training program and assess the participants' satisfaction with the content of training and the way in which the information was presented.

Step 4. Evaluate the Training

Evaluate the effectiveness of the training program by assessing when and how the new information has been used and the need for additional training.

DEVELOPMENT / IMPLEMENTATION

Determining Training Needs

Defining the expected student results, identifying the skills staff need in order to achieve the expected results and assessing the staffs' current skills should be components of the internal environmental scan as described in Section C of this guide.

The needs assessment for staff development must accurately identify the **content** for the projected training, including the topical areas and the respondent's level of expertise regarding that topic. Some personnel may have expertise in certain teaching strategies, whereas others may have no more than a basic awareness of those same strategies. Level of expertise is an important consideration for the design of training format. Three samples of needs assessments for topical areas are provided on pages H-6 through H-9. These three samples list some of the topics which may need to be addressed through inservice training. In the identification of topics, general skills, as well as skill development related to specific instructional strategies and approaches, must be addressed. The adults who work together to direct and provide the education of students must be trained in the skills of team management, collaborative decision-making, and group dynamics (LeRoy, et al., 1990). The following are examples of additional topics which may also be considered:

Cooperative Teaming (teachers)
Curriculum Adaptations
Cooperative Learning
Related Service Input in Classrooms
Proactive Behavior Support Plans
Heterogeneous Grouping
Consultation
Environmental Accommodations
Peer Relationship Supports
M.A.P.S. Process
Teach/Reteach
Family/Community Involvement

When designing a training plan, it is important to assess not only content needs, but also the best **method of presentation**. Many inservice sessions have failed to achieve their objectives, not because of inadequate or inappropriate content, but because of inappropriate presentation. A survey questioning how participants prefer to learn will assist in the identification of successful inservice practices and preferences by identifying the factors that affect now much information is transferred from the inservice to the job.

Planning the Training

Staff development works best when all members of the faculty senate and other staff take part in developing training objectives and activities as a part of the strategic planning process. Participant decision-making means shared responsibility and accountability, which results in highly effective staff development. The school's staff development needs assessment information and strategic plan objectives and activities should be shared with the county staff development council so more than one school can jointly participate in staff development activities that meet common needs. In planning professional development activities, the faculty senate will have to determine:

- Who will participate.
- How they will be selected.
- When and where the sessions will be held.
- What topics will be presented.
- The expected outcomes of the session.

The following questions should, also, be carefully considered when preparing a training plan:

- Was the training topic selected by the staff and was the staff involved in planning?
- Are the goals for the training clearly stated?
- Is the information presented backed by research?
- Does the administration support the concepts being presented?
- Do participants have an opportunity to observe, practice and receive feedback during the training period?
- Is the method of presentation appropriate for the content?
- Will there be ample opportunity for follow up?

The inservice session is only the beginning of effective professional development. Provision has to be made for guided practice, support and assistance, follow-up, follow-through and feedback. The specific professional development training session may fade in the memory of individual participants if left alone; therefore, these types of additional training strategies are necessary to successful professional development.

In addition to inservice sessions and follow-up techniques, other strategies for professional development, which may be useful include the following:

- Visitation in inclusive general education classrooms, special education classrooms and community programs.

- Participation in community activities which include disabled persons.
- Communication with persons who have other knowledge about students with disabilities, such as parents, university faculty and other agency personnel.
- Access to publications on serving students with disabilities.
- Personal training opportunities, such as video/audio tapes, college classes and conferences.

The following are some suggestions for locating persons with expertise on inclusionary practices:

- Professional organizations
- Other school districts
- Colleges and universities
- Service organizations such as Lions, Shriners
- Support organizations such as United Way, Chamber of Commerce, Community Mental Health
- Parent/Teacher Organizations
- State or federal Departments of Education
- International Bulletin Board of training resources
- Parent/Educator Resource Centers

Conducting the Training

Every effort should be made to make participants comfortable in the training setting and more enthusiastic about learning new skills. Obtaining staff input on their preferences as to where, when and how staff development activities are conducted, as well as the topics to be addressed, will increase the participants' motivation and commitment to being actively and positively involved in available staff development opportunites. We all learn better in workshops specifically designed to meet our needs that are provided in a pleasant, appropriate setting.

Ways to make the enviroment more conducive for learning include providing a comfortable setting with tables for group activities, refreshments or meals, if possible, and frequent but short breaks (i.e., every 45-55 minutes). The length of staff development workshops needs to be varied on the basis of the type of training (lecture/presentation or participation in activities) and staff ability to understand the content. Schedule staff development activities when staff are relaxed and ready to learn. An "icebreaker" or fun activity is an effective tool for helping staff "shift gears" and make the transition from their role as teachers to that of learners.

Staff development is more successful when there are opportunities for active participation by all staff, the content is presented in a variety of ways and the information/skills presented are practical and easily applied. "Set the stage" for the workshop or presentation by informing the participants of the importance of the staff development activity, how it will benefit them and students, and the expectations for applied use of the information/skills. Follow-up activities need to be planned and scheduled to reinforce the understanding and application of the presented information/skills. Staff who use new skills or strategies and/or apply newly learned information must be rewarded to maintain this level of commitment and to convey to other staff members the importance and value of staff development.

Evaluating the Training

Once a staff development session has been provided, it is important to gather feedback regarding the success of that training. Feedback regarding the content is important in determining if additional training on that topic will be necessary. Feedback on the method of presentation will direct modifications in future inservice sessions to make them more beneficial to the participants. A sample of an inservice session evaluation is found on page H-10.

TOOLS

STAFF DEVELOPMENT NEEDS SURVEY

The purpose of this survey is to obtain staff input for identifying staff development activities related to the integration of students with exceptional needs. Please check the items you think need to be addressed. In addition, please rank each checked item in priority order, with #1 being the top priority, indicating its importance for staff development programming. Thank you for your assistance.

Name: _____ Date:_____ School:_____

Interest Area	Priority	
		Student Specific
( )	___	Scheduling of students
( )	___	Adapting curriculum and instruction
( )	___	Test-taking accommodations
( )	___	Building student self-esteem
( )	___	Modifying homework assignments
( )	___	Other: _____
		Procedures
( )	___	Grading
( )	___	Discipline procedures
( )	___	Documenting student achievement
( )	___	The Individualized Education Program (IEP) process
( )	___	Other:_____

Area	Priority	
		Personal Skill Areas
( )	___	Alternative instructional strategies
( )	___	Behavioral intervention strategies
( )	___	Informal assessments of student performance
( )	___	Socialization strategies
( )	___	Effective communication strategies
( )	___	Other: _____
		General Knowledge
( )	___	Staff roles and responsibilities
( )	___	Adapting the general education environment
( )	___	Promoting communciation among staff
( )	___	Legal requirements relating to special education
( )	___	Building effective teams
( )	___	Collaborative models and skills
( )	___	Other: _____

Scheduling Preferances

Time: Indicate choices 1 and 2

( ) 2 hours ( ) 3 hours ( ) 4 hours ( ) Full day

Time of day: Indicate choices 1 and 2

( ) After school ( ) During school day ( ) Evening ( ) Saturday

Adapted from Shinsky, John (1991). Techniques for including students with disabilities. Lansing, MI: Shinsky Seminars, Inc.

Elementary/Secondary School

Needs Assessment Survey for Professional Development

Directions: Please check all items according to your degree of expertise. Return this completed form to the faculty senate president.

		Degree of Expertise		
		None	Some	Much
1.	Collaborative Teams	___	___	___
2.	Heterogeneous Grouping	___	___	___
3.	Cooperative Learning	___	___	___
4.	Collaborative Models	___	___	___
5.	Higher Order Thinking	___	___	___
6.	Family/Community Involvement	___	___	___
7.	Student-directed Activities	___	___	___
8.	Thematic Instruction	___	___	___
9.	Learning Strategies	___	___	___
10.	Multi-age Instruction	___	___	___
11.	Integrated Curriculum	___	___	___
12.	Teach/Reteach	___	___	___
13.	Peer Tutoring	___	___	___
14.	Hands-on-Learning	___	___	___
15.	Behavior Management	___	___	___
16.	Problem Solving	___	___	___
17.	_____	___	___	___
18.	_____	___	___	___

(Please indicate any additional need areas on the blanks above).

STAFF DEVELOPMENT NEEDS SURVEY

Please take a moment to complete this survey. We are attempting to identify areas of need for staff develoment activities related to the integration of exceptional/special needs students. Your responses will help us design appropriate training activities. Please return completed surveys by _____(date) to_____(name).

Name:_____School:_____

Do you work with exceptional/special needs students? ____Yes ____No

For each area below, please indicate your level of knowledge and expertise?

	Level of Expetise				Need for Training				Desired Level of Training	
*Content Area	Low			High	Low			High	Awareness (general information)	In-Depth (skills)
Augmentative Communication	1	2	3	4	1	2	3	4	1	2
Computer Access/Modification	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
	1	2	3	4	1	2	3	4	1	2
Other (Specify:)	1	2	3	4	1	2	3	4	1	2

Please list additional areas or topic in which you would like to have staff development. _____

*List content areas that have been identifed as priorities through the needs assessment process.

SESSION FEEDBACK FORM

Directions: Please circle the appropriate number and return this form to the session presenter(s). Thank you!

Session Date: _____

		Strongly Agree	Mildly Agree	Mildly Disagree	Strongly Disagree
1.	The presentation was clear and concise.	1	2	3	4
2.	The content of the presentation was appropriate.	1	2	3	4
3.	Organization and format of session was satisfactory.	1	2	3	4
4.	Objectives of the session were met.	1	2	3	4
5.	Information presented was valuable.	1	2	3	4

6. In the space below please write any personal reactions which you feel are important in terms of this topic.

_____

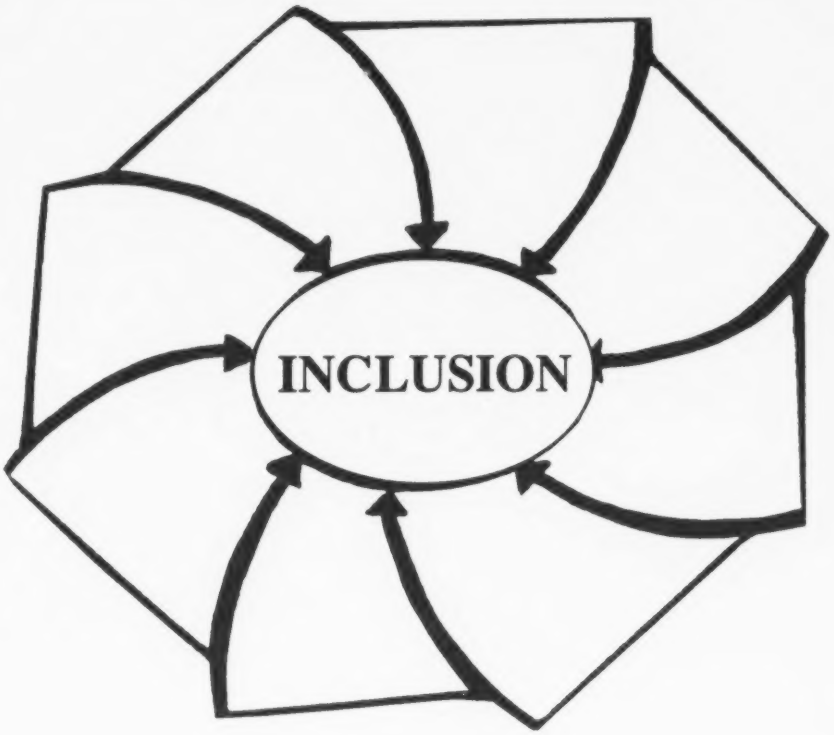
_____

7. In what ways might you use the information and skills you have gained at this session?

_____

_____

_____



RESOURCES

Additional information for further developing and implementing the strategic plan includes:

1. **Legal Foundation**
2. **Supplemental Materials**
3. **Sources**

LEGAL

FOUNDATION

LEGISLATION

Faculty senate strategic plan.

§18-5a-5 Each faculty senate shall develop a strategic plan to manage the integration of special needs students into the regular classroom at their respective schools and submit said strategic plan to the superintendent of the county board of education by the first day of March one thousand nine hundred ninety-five and periodically thereafter pursuant to guidelines developed by the state department of education. Each faculty senate shall encourage the participation of local school improvement councils, parents and the community at large in the development of the strategic plan for each school. Each strategic plan developed by the faculty senate shall include at least (A) a mission statement; (B) goals; (C) needs; (D) objectives and activities to implement plans relating to each goal; (E) work in progress to implement the strategic plan; (F) guidelines for the placement of additional staff into integrated classrooms to meet the needs of exceptional needs students without diminishing the services rendered to the other students in integrated classrooms; (G) guidelines for implementation of collaborative planning and instruction; and (H) training for all regular classroom teachers who serve students with exceptional needs in integrated classrooms.

(Passed March 20, 1994; in effect from passage.)

§18-20-3. County reports.

Counties maintaining special schools, classes, regular class programs, integrated classroom strategic plans and training related to integrated education, basic and specialized health care procedures including the administration of medications, home-teaching or visiting services and receiving or requesting reimbursement from state appropriated funds shall file with the state superintendent of schools on forms supplied by his office, applications, annual reports and such other reports as he may require.

§18-20-5. Powers and duties of state superintendent.

The state superintendent of schools shall organize, promote, administer and be responsible for:

(7) Receiving the county plans for integrated classrooms submitted by the county boards of education, and submitting a state plan, approved by the state board of education, to the legislative oversight commission on education accountability no later than the thirtieth day of November, one thousand nine hundred ninety-four.

SUPPLEMENTAL

MATERIALS

THE LEADER'S ROLE

**To be persuasive, we must be believable;
to be believable, we must be credible;
to be credible, we must be truthful.**

**Edward R. Murrow, Journalist
and News Commentator**

A key element to the strategic planning process is the presence of an individual who possesses the leadership qualities needed to get the job done. However, dreams do not become realities through the actions of a single person. Many individuals must be involved in order to create, produce, sell and sponsor the vision.

Kouzes and Posner have identified five practices common to a leader's accomplishments. Effective leaders challenge, inspire, enable, model and encourage.

Challenging the Process

Individuals who lead others are always seeking a challenge and are involved in a change from the status quo. Leaders are not always the originators of the ideas generated when discovering new and better ways of getting the job done. Generally, these come from the people doing the work. The leader's role is to recognize and support the ideas generated by the followers (stakeholders) in order to accomplish the task at hand. This requires individuals who are open to experimentation, innovation, risk-taking and potential failure.

Inspiring a Shared Vision

Leaders must effectively communicate a vision and inspire followers to accept the vision. They must also inspire stakeholders to see the possibilities for the future and show the benefits for all those involved in the process. The leader must have an understanding of the stakeholders' needs and interests in order to enlist their support. Many times the leader and followers do not have the same ideas about the future. Therefore, it is essential that the leader bring people together to set the direction.

Enabling Others to Act

Effective leaders involve those individuals who must live with the results and who implement the activities which will assist in reaching the vision. As a result, leaders must not only encourage, but provide opportunities for individuals to collaborate and work in teams. For example, what better way to resolve scheduling problems that prohibit adequate support in the regular classroom than by involving the teachers and support personnel who implement the schedule on a daily basis?

Modeling the Way

Leaders must not only be able to articulate the vision for the future, but they must also be skilled in converting the vision into a viable plan. This requires that they have the ability to provide the necessary direction, evaluate performance and make modifications if necessary.

Stakeholders will lose respect for leaders whose behavior is not consistent with their values and beliefs. For example, Ms. Jones communicates a strong belief in the collaboration of all staff members to make better decisions, but she fails to solicit input when making decisions.

Since "Leadership is a relationship between leader and followers" (Kouzes and Posner, 1987), it is essential that we ask followers what characteristics they value in a leader. Research studies indicate most individuals want a leader who is competent, productive, inspiring, trustworthy, and forward-looking; an individual who has conviction and provides direction.

Encouraging the Heart

All individuals tend to become frustrated and disenchanted as any planning process is being implemented. Therefore, it is the leader's role to make them feel like they can win. This includes the recognition and celebration of individual and group achievements. Not all individuals take part in the implementation of activities identified in the plan; however, it is important to keep all parties informed of the progress being made as well as closure on activities addressed as priorities.

Leadership is the art of getting others to want to do something you are convinced should be done. Managers get other people to do, but leaders get other people to want to do. Leaders do this by being credible. They establish credibility through their actions--by challenging, inspiring, enabling, modeling and encouraging.

Numerous studies conducted throughout the country indicate individuals admire leaders who are honest, competent, forward thinking and inspiring. Together these characteristics comprise "credibility." Leaders must be able to effectively communicate the future and have the ability to take stakeholders to the "promised land." In other words, a leader's actions must validate his/her ability to get the job done.

In an effort to involve stakeholders in the planning and implementation process of a strategic plan, leaders should also be committed to an openness to the values of participation, diversity, conflict, reflection and mistakes. Characteristics of the previously mentioned values include:

Participation

Tomorrow's leaders are committed to an openness of participation, where stakeholders participate in discussions and decisions affecting them as opposed to the organization's leaders making the decisions. For example, staff can participate in decisions relevant to scheduling, curriculum planning and the appropriate inclusion of students with disabilities.

Diversity

Diversity must be valued and celebrated in order to get an accurate view of the organization. Stakeholders must be encouraged to express their opinions--even when it's not a common point of view. Incorporating the perceptions of individuals at all levels of an organization gives leaders an understanding of what is really happening throughout the organization. For example, stakeholders may be discussing how personnel can be used to support students in the regular education classroom. However, one of the stakeholders may point out how the reassignment of support personnel would affect the operation of programs where those individuals are typically assigned to provide assistance.

Conflict

Conflict is seen as an opportunity to force the group to examine positions taken by stakeholders and seek viable solutions. Stakeholders should feel comfortable to express their views, recognize differences and seek solutions to resolve the differences. Openly dealing with conflict prevents making decisions without thinking through the alternatives and potential consequences. For example, the stakeholders may not come to consensus on the activities to be addressed as a result of the prioritization of needs identified in the needs assessment. Individuals should feel comfortable stating the reasons they feel activities should be added and/or deleted to the plan. Leaders should use this opportunity, forcing us to examine our positions and/or beliefs.

Reflection

Leaders encourage stakeholders to take time to reflect on an individual's and/or group's thinking in an effort to suspend premature judgments. Time for reflection should not prevent us from achieving the vision for the organization. Solutions occur when a safe environment is created in which individuals are allowed to think out loud in front of a group without fear of criticism, the issue is separated from the person and we each publicly challenge our own thinking.

Mistakes

Genuine openness to mistakes requires a change in thinking about the meaning of mistakes. This new value begins with the attitude that "I could be wrong and you could be right". Individuals are encouraged to acknowledge and learn from their mistakes, so what they have learned can be used to strengthen the organization and themselves.

This section has shared information on the leadership qualities needed to support the strategic planning process. Please take a few moments to answer the following questions prior to embarking upon the planning process. These questions can serve as a self-assessment of the leadership qualities an individual possesses.

1. Do you fully involve everyone as participants in the problem-solving process?

2. Do you listen carefully to all points of view?

3. Are you open to conflict and see it as an opportunity to grow?

4. Do you allow ample time for reflection in order to make a quality decision?

5. Do you openly acknowledge your mistakes?

6. Are you a team-builder?

7. Are you an individual who is willing to take risks?

8. Do people have an understanding of the direction you are leading them?

9. Do you project an image of being trustworthy, capable, productive, inspiring and decisive?

10. Do you lead by example?

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WEST VIRGINIA DEPARTMENT OF EDUCATION

Henry R. Marockie, State Superintendent of Schools

William J. Luff, Jr., Associate Superintendent

Keith C. Smith, Assistant Superintendent, Division of Instructional and Student Services

Michael Valentine, Director, Office of Special Education Programs and Assurances

Assistant Directors

Laura Craffey Maddox
Administration & Compliance

Mary E. Nunn
Program Services

Coordinators

Paula Cottle
Ginger Huffman
Kay Johnston
Susan Lattimer
Ruth Lilly
Dane Linn
Sandra McQuain
Scott Starkey

Robin Bolling
Jacquelyn Burr
Mary Pat Farrell
Kathryn Knighton
Ghaski Lee
Carol Williams

Parent
Barbara Grady

Office of Special Education Programs and Assurances
1900 Kanawha Boulevard East, Building 6, Room 304
Charleston, West Virginia 25305-0330
Phone: (304) 558-2696 or 1-800-642-8541 (V/TDD)

REGIONAL EDUCATION SERVICE AGENCIES
(RESA)

RESA I

205 New River Drive
Beckley 25801
Phone: 256-4712

Carol Morgan
Executive Director

Betty Toney Hartsog
Special Education Coordinator

RESA II

2001 McCoy Road
Huntington 25701
Phone: 529-6205

Ted L. Triplett
Executive Director

Terry L. Smith
Special Education Coordinator

RESA III

501 22nd Street
Dunbar 25064
Phone: 766-7655

Gary Sumpter
Executive Director

Ronald L. Cyrus
Special Education Coordinator

RESA VI

404 Old Main Drive
Summersville 26651
Phone: 872-6440

Elmer Pritt
Executive Director

Kathryn Walker
Special Education Coordinator

RESA V

2507 9th Avenue
Parkersburg 26101
Phone: 485-6513

James Lydon
Executive Director

Norma H. Doane
Special Education Coordinator

RESA VI

30 G. C & P Road
Wheeling 26003
Phone: 243-0440

Stanley Stewart
Executive Director

David Phillips
Special Education Coordinator

RESA VII

1000 Virginia Avenue
Fairmont 26554
Phone: 367-1431

Ronald E. Dellinger
Executive Director

Jim Smiley
Special Education Coordinator

RESA VIII

615 West King Street
Martinsburg 25401
Phone: 267-3595

Charles Duffy
Executive Director

Wesley H. Young
Special Education Coordinator

WEST VIRGINIA ADVISORY COUNCIL FOR THE EDUCATION OF EXCEPTIONAL CHILDREN

766-2000 or 1-800-642-3642

NAME	ADDRESS
Ralph K. Price, Jr. Executive Director	West Virginia Graduate College Post Office Box 1003 Institute, West Virginia 25112